



## CENTRAL FLORIDA ESTATE PLANNING COUNCIL MEMBERSHIP RENEWAL LETTER

July 17, 2023

Dear CFEPC Member:

We look forward to your renewed membership with the Central Florida Estate Planning Council (CFEPC). Our goal is to bring together professionals across a multitude of estate planning disciplines to encourage excellence in our shared field, and your continued participation will be a valuable asset. While dues have remained consistent for many years, the Board has determined the need for a slight increase moving forward. Membership dues for the 2023-2024 year will be \$300. These dues, and our generous sponsors, provide the following:

### **BENEFITS OF MEMBERSHIP**

- 4 dinner meetings, with presentations from nationally recognized experts
- 4 educational webinars from the National Association of Estate Planners & Councils
- Complimentary subscription to Steve Leimberg's [leimbergservices.com](http://leimbergservices.com) (LISI) (a \$360 value)
- 4 lunch & learn meetings to hear from local subject matter experts
- Up to 12 continuing education credits, as applicable
- NAEPC membership benefits listed at: [www.naepc.org/membership/benefits](http://www.naepc.org/membership/benefits)
- Minimum of 2 networking events

Below is a summary of the upcoming meetings and events. Please continue to check the CFEPC website at [www.cfepc.org](http://www.cfepc.org) for updates.

### **DINNER MEETINGS**

September 14, 2023	<u>Charles D. "Skip" Fox IV</u>	Surviving the Morass of Ethical Problems in Representing Multiple Clients in Complex Planning
November 16, 2023	<u>Prof. Gerry Beyer</u>	Cryptocurrency and Non-Fungible Tokens
January 2024*	<i>Speaker TBD</i>	Taxation Update
March 2024*	<u>Prof. Roberta Flowers</u>	Elder Law

### **LUNCH & LEARN MEETINGS\***

October 3, 2023  
December 5, 2023  
February 6, 2024  
April 2, 2024

### **NAEPC WEBINARS\***

May 15, 2024  
June 19, 2024  
July 17, 2024  
August 21, 2024

### **SOCIAL EVENTS**

August 24, 2023	CFEPC's Cocktails & Connections Kickoff - Gatlin Hall Brewing Company
May, 2024*	Year-End Annual Meeting, location TBD

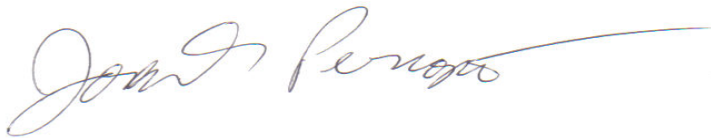
*\* Date, topic, and/or speaker are tentative and subject to change*

To guarantee that your information appears in this year's directory, please return your membership application with your membership fee payment of \$300 (or \$310 if you request a printed directory) by July 31st. Checks should be made payable to the "CFEPC" and mailed to the address listed at the bottom of the form. You also have the ability to pay on-line at:

<https://link.clover.com/urlshortener/wMMs2b>

Lastly, we would like to thank and acknowledge our sponsors, as they play an important role in the success of our Council. If you are interested in learning more about becoming a sponsor, there are opportunities still available. Please see the enclosed list of sponsorship benefits and pricing, and contact Lisa Amoroso at [Lisa.Amoroso@cypressbanktrust.com](mailto:Lisa.Amoroso@cypressbanktrust.com) for more information.

Sincerely,



Joseph M. Percopo  
President  
Central Florida Estate Planning Council

**2023-2024 CFEPC Board of Directors**

Joseph M. Percopo, President  
Nicole Donelson, 1<sup>st</sup> Vice President  
Ashley White, 2<sup>nd</sup> Vice President  
Andrea Niemann, Treasurer  
Lisa Amoroso, Secretary  
Thomas Shaw, Past President

Jennifer Bostedo  
Tiffany Collier  
Daniel Harris  
Chris Suto  
Stacey Prince-Troutman  
Andrew Thompson  
Lemar Williams

Mia Drury, Administrative Assistant  
[Membership@cfepc.org](mailto:Membership@cfepc.org)  
407-621-6271

Member of the National Association of Estate Planners & Councils (NAEPC)

