



CENTRAL FLORIDA ESTATE PLANNING COUNCIL MEMBERSHIP RENEWAL LETTER

July 27, 2024

Dear CFEPC Member:

We are excited to welcome you back as a member of the Central Florida Estate Planning Council (CFEPC). For more than 70 years, we have been uniting professionals from various estate planning disciplines to foster excellence in our field. Your ongoing participation is invaluable to achieving this goal.

To address rising costs and maintain the high quality of our programs, the Board has approved an adjustment to membership dues. Dues for the 2024-2025 year be \$400, however, members who renew by August 31st, 2024, will receive a discounted rate of \$350. You can complete your renewal ONLINE ONLY at www.cfepc.org/members/renewal. Payment by check or PayPal/credit card is available. We hope you find this to be a much smoother experience.

These contributions, along with support from our generous sponsors, provide the following benefits:

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 (LISI) (a \$360 value)
- 4 lunch & learn meetings to hear from local subject matter experts
- Up to 12 continuing education credits, including CLE, CFP, CPA, & CTFA
- NAEPC membership benefits are listed at: www.cfepc.org/members/benefits
- Minimum of 2 networking events

Below is a summary of the upcoming meetings and events. Please continue to check the CFEPC event calendar at www.cfepc.org/events for updates on local and national offerings.

DINNER MEETINGS

September 12, 2024	<u>Jolyon D. Acosta</u>	Florida's New Income and Principal Act
November 14, 2024	<u>Robert H. "Bo" Trudeau</u>	Basics of Asset Protection in Florida
January 16, 2025	<u>Bob Kirkland</u>	IRAs & Post-Mortem Planning
March 13, 2025	<i>Speaker TBD</i>	2026 Updates

LUNCH & LEARN MEETINGS*

October 1, 2024
December 3, 2024
February 4, 2025
April 1, 2025

NAEPEC WEBINARS*

May 21, 2025
June 18, 2025
July 16, 2025
August 20, 2025

SOCIAL EVENTS

August 21, 2024 Season Kickoff – The Castle Irish Pub & Restaurant, College Park
April 24, 2025 Year-End Annual Meeting – St. Johns Rivership Co., Sanford

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

The Board is excited to announce the launch of our new website, designed to be more accessible, interactive, and user-friendly. We believe it will make it easier for you to find the information you need to stay informed. One key feature is the enhanced membership directory, which is now more accessible and engaging online. Consequently, with a more robust website, we will no longer offer a printed directory.

We would also like to express our gratitude to our sponsors, whose support is vital to the success of our Council. If you are interested in sponsorship opportunities, there are still options available. For more information, please visit our website: www.cfepc.org/council/sponsor-sales. If you are interested in becoming a sponsor, please contact Jeanette Mora at jeanette.mora@fff.law and copy Mia Drury at membership@cfepc.org.

Please note, if you are paying by check, please send to:
MS. ANDREA NIEMANN
WR & ASSOCIATES, P.A.
1419 GENE STREET · WINTER PARK, FL 32789

We are looking forward to a great year!

Sincerely,



Nicole Donelson
President
Central Florida Estate Planning Council

2024-2025 CFEPCC Board of Directors

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

