



## CENTRAL FLORIDA ESTATE PLANNING COUNCIL NEW MEMBERSHIP LETTER

July 27, 2024

Dear New CFEPC Member Applicant:

Thank you for your interest in 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. We welcome your participation in achieving this goal.

Dues for the 2024-2025 year will be \$400, however, new members will receive a discounted rate of \$350 for their first year. You can complete your membership application ONLINE at [www.cfepc.org/members/application](http://www.cfepc.org/members/application). 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](http://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](http://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](http://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.

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](http://www.cfepc.org/council/sponsor-sales). If you are interested in becoming a sponsor, please contact Jeanette Mora at [jeanette.mora@fff.law](mailto:jeanette.mora@fff.law) and copy Mia Drury at [membership@cfepc.org](mailto: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)

