

September 7, 2021

Dear Greensboro Estate Planning Council Members  
and Prospective Members:

I hope that you and your family are staying well during this unprecedented time. The officers and directors of the Greensboro Estate Planning Council, Inc. have endeavored to continue the programming and collaboration key to our Council's mission of providing a medium for networking and discussion of up-to-date estate planning topics. We are looking forward to the opportunity to network and meet old friends and new ones this coming Council year as we thoughtfully adapt to changes brought about by the pandemic.

We are excited to offer the following five meetings this 2021-2022 Council year:

<b>Date</b>	<b>Speaker</b>	<b>Topic</b>
<i>Tuesday,</i> September 28 <sup>th</sup>	<b>Paula McMillan</b> , CPA/PFS, CFP®, CGMA of Stearns Financial Group	<b>What's Your Client's Investment Strategy?</b>
<i>Thursday,</i> November 4 <sup>th</sup>	<b>Addison R. Maille</b> , CPA/JD of Sharrard McGee & Co., P.A.	<b>Upcoming Tax Changes</b>
<i>Wednesday,</i> January 19 <sup>th</sup>	<b>Jim Reichard</b> , CFP, CIMA, CAIA of Bank of America Private Bank	<b>Economic and Market Update</b>
<i>Wednesday,</i> March 23 <sup>rd</sup>	<b>John Dunsmoor</b> , JD of Dunsmoor Law, P.C.	<b>Blockchain and Cryptocurrency</b>
<i>Wednesday,</i> May 18 <sup>th</sup>	<b>Justin N. Outling</b> , JD of Brooks, Pierce, McLendon, Humphrey & Leonard, LLP	<b>Economic development initiatives in Greensboro and Guilford County</b>

Please mark your calendars with all five meetings, which are scheduled at the Greensboro Country Club. The Club will be making major renovations to their campus this year, so due to related scheduling concerns our first two meetings vary from our typical meeting days. Specifically, September's meeting is on a Tuesday, September 28<sup>th</sup>, and November's meeting is much earlier in the month, on Thursday, November 4<sup>th</sup>. **As of the date of this letter, all meetings are scheduled as in-person meetings, but our Council and attendees will be required to abide by applicable state and local laws and follow CDC guidelines in place at the time of each meeting.**

With the email conveying this letter are links to the membership application and the applications for new members, both the regular membership application, and the application for new at-large membership. **Please print out the appropriate form for you, fill it out, and send promptly to our Treasurer, Chris Regeis of Innovative Financial Solutions, LLC, at the**

Greensboro Estate Planning Council Members  
and Prospective Members  
September 7, 2021  
Page 2

**address indicated on the renewal form.** With the transition back to in-person meetings, annual dues for this year will be \$125.00. Please send your annual dues check to Chris, along with your completed form.

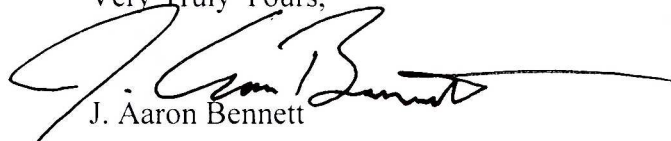
We encourage you to invite your colleagues to join our Council. As stated above, there is one form for applicants in each of the four traditional membership categories (1) NC attorneys, (2) NC CPAs, (3) employees of trust companies and bank trust departments (CTFA, etc.), and (4) credentialed financial service professionals (CLUs, ChFCs, and CFPs). There is another form for applicants for "at large" membership, defined as those who do not fit in one of the traditional four categories summarized above, but whose work is directly related to the field of estate planning.

All first-time guests can visit a meeting free of charge. Returning guests will be charged \$30.00.

Please take time to visit the Council's website ([www.greensboroepe.org](http://www.greensboroepe.org)) for additional information about for additional information about members, forms, meeting dates / information, and sponsor links, as well as information about the National Association of Estate Planning Councils.

If there is anything our Board or I can do for you, please do not hesitate to contact us. A list of the members of our Board is attached. We look forward to the coming year, and especially kick off meeting on Tuesday, September 28<sup>th</sup>.

Very Truly Yours,



J. Aaron Bennett