JOHNSON, PEDDRICK & MCDONALD, PLLC

ATTORNEYS AND COUNSELORS AT LAW
440 WEST MARKET STREET • SUITE 300
GREENSBORO, NORTH CAROLINA 27401

RONALD P. JOHNSON*
MARTHA T. PEDDRICK*
DAVIS MCDONALD
JUSTIN R. ERVIN, III+
OF COUNSEL:
MARGARET ROBISON KANTLEHNER

TELEPHONE (336) 574-9720

TELEFAX (336) 574-9734

* BOARD CERTIFIED SPECIALIST IN ESTATE PLANNING AND PROBATE LAW
+ALSO LICENSED IN FLORIDA

E-MAIL: DMCDONALD@JPLEGAL.NET

August 16, 2017

Dear Greensboro Estate Planning Council Members
and Prospective Members:

I hope you have been having a rewarding summer! The officers and directors of the Greensboro Estate Planning Council are excited about the excellent speakers we have lined up for our five meetings this fiscal year. Our meetings will once again be held at the Greensboro Country Club on select Wednesday evenings beginning at 5:30 p.m. The specific dates, speakers and topics are as follows:

Date	Speaker	Topic
September 27, 2017	Adam Tarleton, Attorney Brooks Pierce	Unraveling Outdated Estate Plans using the $5 Million Exemption
November 15, 2017	Keith Wood, Attorney Carruthers & Roth	Ten Tax Things You Didn't Know about Gifts
January 17, 2018	Jeff Korzenik, Chief Investment Strategist for Fifth Third Bank	Economic and Market Update
March 14, 2018	A. Frank Johns, Attorney Booth Harrington & Johns	The Status of Medicaid Planning and Planning Opportunities for Veterans
May 16, 2018	Tom Comito, Lincoln Financial Advance Planning	Life Insurance – How It Really Works and What Can Go Wrong

With the email conveying this letter are links to the membership renewal application and the applications for new members, both the regular membership application and the application for a new at-large membership. Please print out the appropriate form for you, fill it out and send it back promptly to our treasurer, Bruce McGuirk, at the address indicated on the membership renewal application. Annual dues for this year will be $125.00, only $5 more than last year. Please send the annual dues check to Bruce along with your completed form.

We encourage you to invite your colleagues to join the Greensboro Estate Planning 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" memberships, those who don't fit in one of the traditional categories, but whose work is directly related to the field of estate planning.) For the first meeting to be held Wednesday, September 27, 2017, first time guests will not be charged a guest fee. After that meeting, first time guests will be charged a $20.00 guest fee. Guests attending their second or subsequent meeting will be charged $30.00.

To help continue keeping costs down, we are also encouraging our members to become meeting sponsors or to recommend organizations that relate to estate planning that would be interested in sponsoring a meeting. I've attached a link to a brief information piece on the benefits of sponsoring a meeting that details the benefits of meeting sponsorship. We are still looking for sponsors of our November, March and May meetings. If you or your organization would like to be a meeting sponsor, please email me.

The Board is looking forward to another great year. Please take some time to visit the Council's website for additional information about members, forms, meeting dates/information, and sponsor links, as well as information about the National Association of Estate Planning Councils and the benefits that they offer.

If there is anything our Board or I can do for you, please do not hesitate to contact us. (A link to the contact list for the members of our Board of Directors also accompanies the email conveying this letter.)

We look forward to seeing you at the September 27th meeting!

Best regards,

Davis McDonald

Davis McDonald,
President, 2017-2018
Greensboro Estate Planning Council, Inc.

DM:sj

Enclosures

GREENSBORO ESTATE PLANNING COUNCIL, INC
2017-2018 List of Officers & Directors

President & Director:

Davis McDonald, Attorney
Johnson, Peddrick & McDonald, PLLC
440 West Market Street, Suite 300
Greensboro, NC 27401
Phone: (336) 574-9720 Fax: (336) 574-9734
dmcdonald@jplegal.net

Vice President & Director:

Milton Howell, III, CPA
DMJ & Co., PLLC
703 Green Valley Road, Suite 201
Greensboro, NC 27408
Phone: (336) 553-2330 Fax: (336) 553-2331
mhowell@DMJ.com

Secretary & Director:

Fred Turner, CFP
Fifth Third Private Bank – Wealth Management
804 Green Valley Road, Suite 202
Greensboro, NC 27408
Phone: (336) 317-3063
fturner1@triad.rr.com

Treasurer & Director:

Bruce McGuirk, CLU, ChFC, CFP
John Hancock Brokerage
6002 Armfield Ct
Summerfield NC 27358
(336) 378-1238 ext.1
bruce_mcguirk@jhancock.com

Immediate Past President & Director:

Vincent James Tosco, CLU, AAMS
Navigon Financial Group
3816 North Elm Street, Suite A
Greensboro, NC 27455-2776
Phone: (336) 379-8207 ext. 1010 Fax: (336) 379-8349
vtosco@navfin.com

Directors-at-Large:

J. Aaron Bennett, Attorney (2014)
Carruthers & Roth, P.A.
235 N. Edgeworth St.
Greensboro, NC 27401
(336) 478-1105
jab@crlaw.com

Dennis A. Newman, CPA (2015)
Dennis A. Newman, CPA/ABV, P.A
519B Simpson St.
Greensboro, NC 27401
(336) 763-1177
dnewman1@triad.rr.com

Karen R. Killian, CTFA (2016)
Wells Fargo Private Bank
300 N. Greene St. 6th FL
Greensboro, NC 27401
(336) 378-4085
karen.killian@wellsfargo.com

Christopher A. Regeis, CLU, CFP, ChFC (2017)
Innovative Financial Solutions LLC
620 Green Valley Road, Suite 306
Greensboro, NC 27408
(336) 398-1181
chris.regeis@lpl.com

Greensboro Estate Planning Council, Inc.

Membership Renewal Form
For Current Members

For 2017 – 2018

In order to renew your membership for the 2017-2018 Membership Fiscal Year, please complete this form and mail it with your check in the amount of **$125.00** made payable to "**Greensboro Estate Planning Council, Inc.**" to our Treasurer at the following address:

Bruce McGuirk, CLU, ChFC, CFP
John Hancock Brokerage
6002 Armfield Ct
Summerfield NC 27358

Member Information (Please print clearly – will be entered on the GEPC website)

First Name: ____

Middle Name: ____

Last Name: ____

Designation (s): ____
(Attorney, CPA, CTFA, ChFC, CFP, etc.)

Business Name: ____

Address: ____

Phone: ______________________ Fax: ________________________

Email: ______________________ Website: _____________________

Current Discipline(s): *Please "x". If you have more than one, please indicate primary and secondary*

____ Attorney ____ CPA ____ Trust Officer ____ Financial Service Professional

_____Other

______________ ____
Date **Signature of Applicant**

Name You Want on Your Name Tag: _________________________________

GREENSBORO ESTATE PLANNING COUNCIL, INC.
2017-2018 NEW MEMBER APPLICATION for Attorney, CPA, Credentialed Financial Professional, or Employee of Bank Trust Dept. or Trust Company)

New Member Information (Please print clearly – will be entered on the GEPC website)

First Name: ____________________ Middle Name: ____________________

Last Name: ______________________

Designation (s): ______________________ (CPA, CTFA, ChFC, etc.)

Business Name: _____________________

Address: ____

Phone: ________________________ Fax: __________________________

Email: _________________________ Website: _______________________

Name You Want on Your Name Tag: _____________________________________

I hereby apply for membership. I qualify for membership as (check appropriate item):

a. ________An Attorney licensed to practice in North Carolina

b. ________A Certified Public Accountant licensed in North Carolina

c. ________A Credentialed Financial Professional (CLU, ChFC or CFP)

d. ________Employed in a Bank Trust Department or Trust Company

________________ ____
Date Signature of Applicant

Recommended by (must be signed by two GEPC members as indicated below):

__________ ____
Date Estate Planning Council Member of **same** professional classification

__________ ____
Date Estate Planning Council Member of **different** professional classification

The Annual Membership fee is $125.00. Please make your check payable to the Greensboro Estate Planning Council, Inc. Please mail this form with your check to:

Bruce McGuirk, CLU, ChFC, CFP
John Hancock Brokerage
6002 Armfield Ct
Summerfield NC 27358

GREENSBORO ESTATE PLANNING COUNCIL, INC.

2017-2018 NEW MEMBER APPLICATION
FOR AT-LARGE MEMBERSHIP

Please Print Clearly

First Name:______________________ Middle Name: _____________ Last Name: ___________________________

Business Name: ____

Address: ____

Phone: _________________________ Fax: _________________________________

Email: _________________________ Website: ______________________________

Professional Designation/Job Description: ____

Years of Service in Your Profession: ________

At-Large Membership is open to professionals (other than NC attorneys, NC CPAs, CLUs, ChFCs, CFPs, or employees of trust companies or bank trust departments) whose responsibilities are **directly** related to the field of estate planning.

Please explain your estate planning experience: ____

____

____

____

(Once the completed application is submitted, the Board of Directors of GEPC will have the final determination whether the applicant's work is **directly** related to the field of estate planning.)

___________________ ____

Date Signature of Applicant

Recommended by:

__________ ____

Date Estate Planning Council Member and Designation

__________ ____

Date Estate Planning Council Member and Designation

* Complete entire application and obtain signature of Greensboro Estate Planning Council, Inc. sponsoring members. If you have not identified sponsoring members, please complete and submit the rest of the application with a note that you need assistance identifying sponsoring member(s).
* Do not submit check with your application. Completed applications are reviewed throughout the year by the Board. The completed application should be submitted as soon as possible to ensure adequate review time prior to the next meeting. You will be contacted by a Board member regarding their decision.

Please mail, email, or fax this completed application to the Greensboro Estate Planning Council Treasurer:

Bruce McGuirk, CLU, ChFC, CFP
John Hancock Brokerage
6002 Armfield Ct
Summerfield NC 27358
(336) 378-1238 ext.1
bruce_mcguirk@jhancock.com

BENEFITS OF SPONSORING A MEETING OF

THE GREENSBORO ESTATE PLANNING COUNCIL

FOR THE 2017-2018 CHAPTER YEAR

The GEPC is made up of professionals in the following areas: Attorneys, CPAs, credentialed financial professionals (who have either a CLU, ChFC or CFP designation), bank trust officers & wealth management advisors; and at large members whose responsibilities directly relate to the field of estate planning. We traditionally meet on the third Wednesday in September, November, January, March and May, from 5:30-7:30 p.m. at Greensboro Country Club (though the meetings in September and March this fiscal year will be on other Wednesdays).

The purpose of the Greensboro Estate Planning Council is three-fold:

1. To promote the interests of our members in all aspects of Estate Planning, through programs of mutual interest;

2. To promote networking among the members through attendance at the bi-monthly membership meetings; and

3. To promote the exchange of ideas and perspectives among the members.

For a $500.00 fee, your firm or company will receive the following benefits, by being a sponsor of one of our five Membership Meetings between September, 2017 and May, 2018:

1. Promotion of your firm in our meeting announcement for the upcoming meeting. These notices are sent out 30 days in advance of each of the meetings. Please supply us with a description of your firm's services in 2-3 sentences. This will be published in the meeting announcement.

2. Your representatives are introduced at the beginning of the meeting that you sponsor, and the opportunity to give a 5-minute info-commercial about your firm or company.

3. The opportunity for two of your representatives to attend our meeting, and network during the social hour that follows the program from 6:30-7:30 p.m.

4. PLEASE NOTE: Our September and January meetings already have sponsors. The only sponsorships still available are for our November, March and May meetings.

If you have any questions, please call our Treasurer Bruce McGuirk at (336) 378-1238 ext 1, or email him at bruce_mcguirk@jhancock.com