



August 1, 2019

Dear Greensboro Estate Planning Council Members and Prospective Members:

I hope you are having a wonderful summer!

The Greensboro Estate Planning Council's Board of Directors met on June 26, 2019 to plan the activities for our upcoming year. We are pleased to offer five meetings this year filled with very informative topics related to estate planning that you will not want to miss! Attached to my letter is a list of the meeting dates, topics and speakers. Also attached is a list of Directors for 2019-2020, a Membership Renewal form, New Member Form, an At-Large Member Application and lastly a Benefits of Sponsoring a Meeting Form.

As you mark your calendar with all five meeting dates, you will notice a change this year. Because Greensboro Country Club will be making major renovations to their campus this year, all meetings in 2019-2020 will be on **Thursday evenings**. The main ballroom is NOT available on Wednesday evenings, as it is reserved for member dining. The Board feels like the move to Thursday evenings will provide you with a fun and informative way to wind down your work week!

To encourage visitors and new members to our council, it is the decision of the Board that all first-time guests can visit free of charge this year. Returning guests will continue to be charged \$30.00. Because the board has done an excellent job controlling costs, and excellent support of our meeting sponsors, dues will remain at \$125.00. Please fill out your membership renewal form (attached) and send it promptly to our treasurer Dennis Newman, CPA at PO Box 49063, Greensboro, NC 27419.

The Board is looking forward to another great year. Please take some time to visit the Council's website ([www.greensboroepc.org](http://www.greensboroepc.org)) for additional information about members, forms, meeting dates and sponsor links.

We look forward to seeing you and a guest at our first meeting of the year on Thursday, September 19<sup>th</sup> as we kick off another great year.

If there is anything our Board or I can do for you, please do not hesitate to contact us.

Sincerely,  
  
Fred P. Turner, CFP®

President 2019-2020 Greensboro Estate Planning Council, Inc.

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# GREENSBORO ESTATE PLANNING COUNCIL, INC.

## LIST OF DATES, SPEAKERS, TOPICS & SPONSORS

### 2019-2020 COUNCIL YEAR

<u>Date</u>	<u>Speaker</u>	<u>Topic</u>	<u>Sponsor</u>
September 19, 2019	Caroline McKay Head of Advanced Legal Team John Hancock	"Estate Planning in Times of Uncertainty"	<u>Open</u>
November 14, 2019	Tracey Gillespie of Wells Fargo Private Bank	"Planning for Business Transition in a Peak Economy"	John Hancock Insurance
January 16, 2020	Tracie McMillion of Wells Fargo Private Bank	"Economic Outlook and Market Update"	L Howard Law, PLLC
March 19, 2020	Bonnie Brennan and Tash Perrin of Christie's	"Artful Planning"	American National Bank & Trust Company
May 21, 2020	Terrill Sandiford of The Salvation Army	"Planned Giving 101"	Firth Third Private Bank

# GREENSBORO ESTATE PLANING COUNCIL, INC

## 2019-2020 Officers & Board of Directors

President:

**Fred Turner, CFP®**  
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**J. Aaron Bennett, Attorney**  
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Treasurer:

**Dennis A. Newman, CPA**  
519B Simpson St  
Greensboro, NC 27401  
(336) 763-1177  
Dnewman1@triad.rr.com

Immediate Past President:

**R. Milton Howell III, CPA, CSEP**  
DMJ & Co., PLLC  
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Directors:

**Karen Button, CTFA (2016)**  
Wells Fargo Private Bank  
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[Karen.button@wellsfargo.com](mailto:Karen.button@wellsfargo.com)

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**Justin R. Ervin, III Attorney (2018)**  
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**Addison Maille, CPA(2019)**  
Sharrard, McGee & Co., PA  
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High Point, NC 27262  
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amaille@smccpa.com

**Greensboro Estate Planning Council, Inc.**

**Membership Renewal Form  
For Current Members**

**For 2019– 2020**

In order to renew your membership for the 2019-2020 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:

Dennis A. Newman, CPA  
PO Box 49063  
Greensboro, NC 27419  
[Dnewman1@triad.rr.com](mailto:Dnewman1@triad.rr.com)

**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.**  
**2019-2020 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 made out to the GEPC to:**

*Dennis A. Newman, CPA*  
\_\_\_\_\_  
P.O. Box 49063  
\_\_\_\_\_  
Greensboro, NC 27419

**GREENSBORO ESTATE PLANNING COUNCIL, INC.**

**2019-2020 NEW MEMBER APPLICATION  
AT-LARGE MEMBER**

**Applicant's Information - 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 attorneys, CPAs, CLUs, ChFCs, CFPs, or trust officers, whose responsibilities are **directly** related to the field of estate planning. Please explain your estate planning experience: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Date Signature of Applicant

**Recommended by (must be signed by two GEPC members):**

\_\_\_\_\_  
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:***  
*Dennis A. Newman, CPA (Treasurer)*  
*Dennis A. Newman, CPA/ABV, P.A.*  
P.O. Box 49063  
Greensboro, NC 27419  
(336) 763-1177  
Email: [dnewman1@triad.rr.com](mailto:dnewman1@triad.rr.com)

**BENEFITS OF SPONSORING A MEETING OF  
THE GREENSBORO ESTATE PLANNING COUNCIL  
FOR THE 2019-2020 CHAPTER YEAR**

The GEPC is made up of professionals in the following areas: Attorneys, CPA's, credentialed financial professionals (who have either a CLU, ChFC or CFP), 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 Thursday in September, November, January, March and May, from 5:30-7:30 p.m. at Greensboro Country Club.

**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, 2019 and May, 2020:**

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..

**If you have any questions, please call our Treasurer Dennis A. Newman at (336)763-1177, or email him at [Dnewman1@triad.rr.com](mailto:Dnewman1@triad.rr.com)**