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July 31, 2024

Dear Greensboro Estate Planning Council Members and Prospective Member,

Hope you and your family are enjoying these last days of summer – and staying cool. The Greensboro Estate Planning Council Board met recently to plan our meetings for our 2024-2025 year. We are looking forward to the opportunity to network and meet old friends and new ones this coming Council year. The board has voted to keep our dues the same as last year at \$125. Please complete the attached membership renewal form along with a check made payable to the Greensboro Estate Planning Council and send it to our Treasurer, Paula McMillian, at the address indicated on the form.

We are pleased to announce the list of speakers attached and believe you will find the line up to be both entertaining and informative

<u>Date</u>	<u>Speaker</u>	<u>Topic</u>
Sept 18, 2024	<u>Amanda Gargis</u> , Senior VP, Regional Fiduciary Officer and <u>Kendal Dobra</u> , Senior VP, Regional Fiduciary Officer both with Bank of America Private Bank	Unique Considerations in Working with Corporate Trustees
Nov 20, 2024	<u>A. Frank Johns</u> , attorney with Booth Harrington and Johns of NC PLLC	Elder Law Planning
Jan 15, 2025	Niles Greene, SVP Investment Manager with Truist Wealth	Economic Update
March 19, 2025	<u>Bradley Jacobs</u> , attorney with Tuggle Duggins P.A.; <u>Chris Genheimer</u> , attorney with Carruthers & Roth	Pannel on SLAT planning / 2025 Estate Exemption Sunset
May 14, 2025	<u>Pamela Duffy</u> , attorney with Ellis Winters	Estate Litigation War Stories

Please mark your calendars for all 5 meetings and join us at the Greensboro Country Club for great speakers and engaging networking cocktail hours with heavy hors d'oeuvres.

The sustainability of any organization depends on new members and we encourage everyone to invite at least 1 guest each this year – I am committing to inviting 3 folks. There is no guest fee for any guest's first meeting and only a \$30 fee for a returning guest.

Also, if you are interested in sponsoring a meeting, please reach out to me or any Board Member to better understand the benefits of sponsoring a meeting (information is also available at www.greensboroepc.org).

If there is anything our Board or I can do for you, please do not hesitate to contact us. We look forward to the coming year, and especially our kick-off meeting on Wednesday, Sept. 18th.

Sincerely,



Erin C. V. Bailey, Esq.
Director, Tuggle Duggins P.A.

Greensboro Estate Planning Council Membership Application 2024-2025

Current (renewing) members and new member and at-large applicants, please complete the appropriate sections below. Then, mail this form and a check for \$125.00 payable to "Greensboro Estate Planning Council, Inc." to our Treasurer (Paula McMillan, Stearns Financial Group, 324 W. Wendover Avenue, Ste 204, Greensboro, NC 27408). For questions, email Paula at pmcmillan@stearnsfinancial.com.

Current (Renewing) Members

- Member Name and Organization: _____
- Note any changes that should be made to your profile information within our directory at <https://www.greensboroepc.org/members/directory> and/or your name tag:
 - _____
 - _____
 - _____
- Any interest in participating on the Board as Board positions come open? _____

New Member Applicants

- Type of Membership
 - Full membership. My responsibilities are directly related to the field of estate planning as a:
 - An Attorney licensed to practice in North Carolina
 - A Certified Public Accountant licensed in North Carolina
 - A Credentialed Financial Professional (CLU, ChFC or CFP®)
 - Employed in a Bank Trust Department or Trust Company
 - At-large membership (applying without one of the designations above)
 - At-Large Membership is open to professionals (other than NC attorneys, NC CPAs, CLUs, ChFCs, CFP®s, 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.
 - _____
 - _____
 - _____
 - 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).
 - Sponsoring member signature/date (same professional classification):
 - _____
 - Sponsoring member signature/date (different professional classification):
 - _____
 - Applicant signature/date:
 - _____
 - Note: Once the completed application is submitted, the Board of Directors of

Greensboro Estate Planning Council Membership Application 2024-2025

GEPC will have the final determination whether the applicant's work is directly related to the field of estate planning.

- 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

- Profile Information

- Full Name: _____
- Designation(s) (CPA, CTFA, ChFC, CFP®, etc.): _____
- Job Title: _____
- Years of Service in Your Profession: _____
- Business Name: _____
- Address: _____
- Phone: _____
- Email: _____
- Website: _____
- Name You Want on Your Name Tag: _____

Interested in Sponsoring a Meeting This Year?

The GEPC is made up of 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 second or third Wednesday in September, November, January, March and May, from 5:30-7:30p.m. at Greensboro Country Club.

The purpose of the Greensboro Estate Planning Council is to promote:

1. the interests of our members in all aspects of Estate Planning, through programming
2. networking among the members through attendance at the bi-monthly membership meetings
3. 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::

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 6:30-7:30p.m.