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September 7, 2022

Dear Greensboro Estate Planning Council Members
and Prospective Members:

I hope that you and your family are staying well and enjoying these last days of summer! 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.

We are excited to offer the following five meetings this 2022-2023 Council year:

<u>Date</u>	<u>Speaker</u>	<u>Topic</u>
Wednesday, September 14 th	J. Aaron Bennett , Attorney of Carruthers & Roth	Extreme Makeover: Irrevocable Trust Edition – The uses, benefits, and limitations related to modifying and decanting irrevocable trusts
Wednesday, November 9 th	Milton Howell , CPA, of DMJPS	Elective Pass-through Entity Tax
Wednesday, January 18 th	Jim Reichard , CFP, CIMA, CAIA of Bank of America Private Bank	Economic and Market Update
Wednesday, March 15 th	Bill Dameworth , CPA of Forensic Strategic Solutions, LLC	Estate Litigation and Valuing Business Interests
Wednesday, May 17 th	TBD	TBD

Please mark your calendars with all five meetings, which are scheduled at the Greensboro Country Club.

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, Erin Bailey of Tuggle Duggins at the address indicated on the renewal form.** Annual dues for this year will be \$125.00. Please send your annual dues check to Erin, along with your completed form. Feel free to hand-deliver as well at our first meeting on September 14th. Thank you in advance for your renewed membership or new membership.

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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.greensboroepc.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 our kick off meeting on Tuesday, September 14th.

Very Truly Yours,

Karen Button