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July 12, 2018

Dear Greensboro Estate Planning Council Members
and Prospective Members:

I trust you have found a way to stay cool this summer!

The officers and directors of the Greensboro Estate Planning Council, Inc. have worked diligently to schedule interesting speakers for the five meetings of the 2018-2019 year. Our meetings will continue to be held at the Greensboro Country Club on designated Wednesday evenings beginning at 5:30 p.m., including our customary open bar and hors d'oeurves.

Date	Speaker	Topic	Sponsor
9/26/18	Keith Hiatt, CPA, AEP of Breslow Starling Frost Warner Boger Hiatt, PLLC	"Tax Planning for 2018 After the 2017 Tax Act"	Old North State Trust, LLC
11/14/18	Jennifer L. J. Koenig, Esq. And Edward T. Chaney, Esq. of Schell Bray PLLC	"Choices in Philanthropy: Comparing Donor Advised Funds and Private Foundations	Community Foundation of Greater Greensboro, Inc.
1/16/19	Tom Jalics, CFA of Fifth Third Private Bank	"Economic and Market Update"	DMJ & Co., PLLC
3/20/19	Dorian Sylvester and Hannah Vaughan of The Corporation Of Guardianship	"Supporting Adults with Cognitive Impairment Issues"	Spangler Estate Planning
5/15/19	Hugh A. Harris, Esq. of NC Department of Justice	"Scams and Frauds"	Douglas Gresham of Jackson National Life

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 back promptly to our treasurer, Aaron Bennett of Carruthers & Roth, P.A., at the address indicated on the renewal form. Annual dues for this year will be $125, unchanged from prior year. Please send the annual dues check to Aaron 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" membership, defined as those who do not fit in the one of the traditional four categories, but whose work is directly related to the field of estate planning.

It is the decision of the board that all first-time guests can visit free of charge this year. Returning guests will be charged $30.00.

We are pleased to have all sponsor positions filled for the 2018-2019 year. The Board is always interested in hearing about potential sponsors for future dates, in order to help continue to keep costs down. Remember that a sponsor must relate to estate planning. I have attached a link to a brief information piece on the benefits of sponsoring a meeting that details the benefits of meeting sponsorship. If you or your organization would like to sponsor a meeting next year, or you know someone else who would, please email me.

The Board is looking forward to another superb year. Please take some time to visit the Council's website (www.greensboroepc.org) 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 they offer.

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 of Directors is attached.

We look forward to seeing you at the September 26th meeting as we kick off our new year. Please register and bring a colleague as a complimentary guest.

Very truly yours,

R. Milton Howell III, CPA, CSEP
President 2018-2019
Greensboro Estate Planning Council, Inc.

Enclosures

BENEFITS OF SPONSORING A MEETING OF

THE GREENSBORO ESTATE PLANNING COUNCIL

FOR THE 2018-2019 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 November this fiscal year will be on other days).

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 and May:

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: All meetings in the 2018-2019 year already have sponsors.

If you have any questions, please contact our Treasurer Aaron Bennett at jab@crlaw.com

GREENSBORO ESTATE PLANNING COUNCIL, INC.
List of Officers & Board of Directors FY 2018-2019

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