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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:

<u>Date</u>	<u>Speaker</u>	<u>Topic</u>
September 27, 2017	Adam Tarleton, Attorney Brooks Pierce	Unraveling Outdated Estate Plans using the \$5 Million Exemption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.

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

DM:sj

Enclosures