Estate Planning Council of Naples

The Estate Planning Council of Naples, Inc. was formally organized in 1972. It is a not-for-profit interdisciplinary organization of professionals involved in estate planning. Currently, the Council has approximately 140 members that are represented by Estate and Taxation Attorneys, Certified Public Accountants, Trust Company Officers, Chartered Life Underwriters and Certified Financial Planners.

COUNCIL OBJECTIVES

1. To encourage its members to continually enhance their skills through continuing education.

2. To cultivate estate planning consciousness in the community.

3. To have its members focus on the ultimate goal of rendering superior professional service to the community that we serve.

4. To have the professionals involved, share resources and expertise which brings together the best possible talents and capabilities to solve specific challenges and find solutions for clients.

"Good fortune is what happens when opportunity meets with planning."
- Thomas Edison

MEETINGS

Meetings are held in the months of November, January, March, May and September. Meetings include a social hour, dinner and a guest speaker. The Vineyards Country Club is the meeting place and occasionally another location. The social hour usually begins at 5:30 pm.

SPECIAL EVENTS

In the month of October the Council holds its "Success Event." at The Vineyards Country Club. This is a one half day program featuring a speaker of national renown. It includes a continental breakfast, lunch and afternoon golf for those who want to play. A separate registration fee to attend the event applies.

MEMBERSHIP

Membership dues include all dinner meetings. Annual dues are $200.00 (Sustaining Members are $75) for a complete fiscal year (November-October). Members joining during the year are charged based on the following sliding scale:

Nov.—Jan. = $200.00
Feb—Apr = $120.00
May—Oct = $ 95.00

TO JOIN

Person's eligible for membership must be a practicing professional as an Estate and Taxation Attorney, Certified Public Accountant, Trust Company Officer, Chartered Life Underwriter or a Certified Financial Planner.

Applicants are required to submit a membership application along with a $50 non-refundable application fee. Applicants must obtain recommendations from two current members, one of whom shall be in the same profession or discipline as the applicant.

Please visit our website at www.epcofnaples.org for additional membership information.

2016 MEETING SCHEDULE

January 19, 2016 – "Preventing Medical Decisions from Eroding Wealth"

March 8, 2016 -"Wealth Transfer/Tax – The Good Giver: An Exploration of Tax-Wise Charitable Giving"

May 17, 2016 – "Deferring and Avoiding the Tax on Net Investment Income: Finding Flexibility in the Fiduciary Toolbox"

September 13, 2016 - "IRS Problem Resolution and Other Tales of the IRS "

October 14, 2016 - Success Event XXV – "TBD"

November 8, 2016 – "Risks for Trustees Holding Closely Held and Family Business Interests"

All meetings are held at The Vineyards Country Club

Contact Us

Estate Planning Council of Naples
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Meetings available for CE Credits:

May 17, 2016

Thomas J. Pauloski, JD

Bernstein Global Wealth Management

"Deferring and Avoiding the Tax on Net Investment Income: Finding Flexibility in the Fiduciary Toolbox"

Joint Event with Collier County Community Foundation

Success Event October 14, 2016

Bruce Stone, JD

Goldman, Felcoski & Stone P.A.

"TBD"

January 19, 2016

Susan O. Cassidy, MD, JD

Critical MD

"Preventing Medical Decisions from Eroding Wealth"

March 8, 2016

Suzanne L Shier

Northern Trust - Chicago

"Wealth Transfer/Tax – The Good Giver: An Exploration of Tax-Wise Charitable Giving"

September 13, 2016

Steven N. Kiltzner, P.A.

Florida Tax Solvers

"IRS Problem Resolution and Other Tales of the IRS"

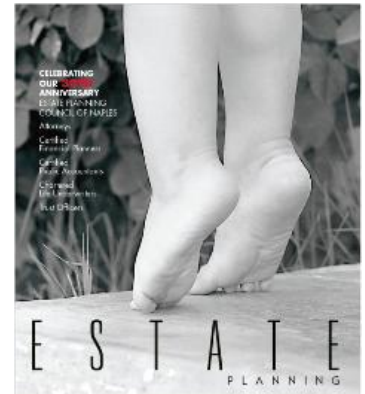
November 8, 2016

(Annual Meeting)

Stephen G. Salley, JD

Banyan Global

"Risks for Trustees Holding Closely Held and Family Business Interests"



Estate Planning Council of Naples, Inc. Board Members/Staff