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

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.

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

Persons 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.

2017 MEETING SCHEDULE

January 24, 2017 – "Finding Opportunity in a Slow Economy"

March 21, 2017 -"Family Entities in a Post Valuation Discount Environment"

May 17, 2017 – "Seven Options in Family Philanthropy"

September 12, 2017 - "Year-End Tax and Estate Planning Strategies"

October 13, 2017 - Success Event XXVI – "Estate and Income Tax Planning for IRAs and Qualified Plans"

November 14, 2017 – "Positioning a Business for an Exit"

All meetings are held at The Vineyards Country Club

Contact Us

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Meetings available for CE Credits:

May 17, 2017

Kathryn W. Miree, JD

Kathryn W. Miree & Assoc., Inc.

"Seven Options in Family Philanthropy"

Joint Event with Collier County Community Foundation

Success Event
October 13, 2017

Alan S. Gassman, JD

Gassman, Crotty, & Denicolo, PA

"Estate and Income Tax Planning for IRAs and Qualified Plans"

January 24, 2017

Stephen S. Lee, Principal

Logan Capital Management, Inc.

"Finding Opportunity in a Slow Economy"

March 21, 2017

Daisy E. Medici &
Jim Brennan, CPA, CFP

Gen Spring Family Offices, LLC

"Family Entities in a Post Valuation Discount Environment"

September 12, 2017

Anne Marie Levin, JD, LLM

Key Family Wealth

"Year-End Tax and Estate Planning Strategies"

November 14, 2017
(Annual Meeting)

John K. Honney, Senior VP, Business Owner Consulting

The Northern Trust Company

"Positioning a Business for an Exit"

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