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

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.

2018 MEETING SCHEDULE

January 30, 2018 – **"New Developments In Asset Protection"**

March 20, 2018 -**" Updated Florida Elective Share Statute"**

May 3, 2018 – **"Top 10 Charitable Trends "**

September 18, 2018 - "Long Term Care Planning and Its Evolving Financial Impact"

October 5, 2018 - **Success Event XXVII – "Undue Influence/Elder Abuse"**

November 13, 2018 – **"Legacy Planning and Preparing Heirs/Sustainable Multigenerational Wealth Transfer/The Missing Piece To Traditional Estate, Tax, and Financial Planning"**

All meetings are held at The Vineyards Country Club

Contact Us

Estate Planning Council of Naples, Inc.
Marsha Jamison, EPC Administrator
c/o Timely Concierge
Email: **marsha@timelyconcierge.com**
Telephone: (239) 200-6918
www.epcofnaples.org

Meetings available for CE Credits:

May 3, 2018

Bryan Clontz

Charitable Solutions LLC

"Top 10 Charitable Trends"

Joint Event with Collier County Community Foundation

Success Event October 5, 2018

Stuart C. Bear, JD

Partner, Shareholder, President of Chestnut Cambronne, PA

"Undue Influence/Elder Abuse"

January 30, 2018

Chris Riser

Riser Adkisson LLP

"New Developments In Asset Protection"

March 20, 2018

Richard Gans

Fergeson Skipper

"Updated Florida Elective Share Statute"

September 18, 2018

Shawn Britt

Genworth Financial

"Long Term Care Planning and Its Evolving Financial Impact"

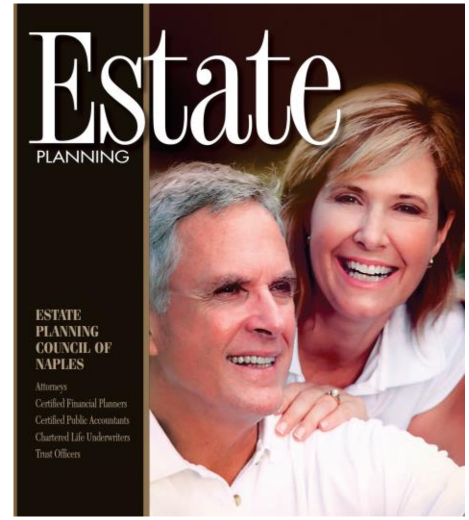
November 13, 2018

(Annual Meeting)

Anne Marie Levin, JD, LLM

Key Family Wealth

"Legacy Planning and Preparing Heirs/Sustainable Multigenerational Wealth Transfer/The Missing Piece To Traditional Estate, Tax, and Financial Planning"



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