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The Estate Planning Council of Northeast Florida

August 20, 2019

Dear Estate Planning Professional:

We hope you enjoyed a safe and relaxing summer. Your Estate Planning Council Officers and Executive Committee have worked hard planning an outstanding series of lunch and dinner programs, and a high quality, national speaker for the annual meeting. These programs will include a variety of current, relevant estate planning and investment topics with a goal of enriching your expertise and providing networking opportunities with various other professionals in the estate planning business. We will host four dinner meetings (9/10/19, 11/19/19, 1/21/20, and 3/17/20) and three lunch meetings (10/22/19, 12/10/19, and 2/11/20), and the annual meeting (5/05/20). The annual meeting will include a three-hour seminar approved for CE. Enclosed is a schedule of speakers and topics for this year.

Please note our first meeting is September 10, 2019 at Epping Forest; Cocktails at 5:30 p.m., dinner at 6:15 p.m. and speaker at 7:00 p.m.

As you may know, there are **three types of membership** categories of the Estate Planning Council. In the **Standard Member category**, the traditional disciplines are: Certified Trust and Financial Advisors, Officers of Trust Companies, and Officers of Bank Trust Departments; CLUs, ChFCs and CFPs, members of The Florida Bar, and Certified Public Accountants, all of whom must be interested in and actively practicing estate planning in Northeast Florida. Dues for 2019-2020 are \$390 for members, **\$365 if paid by September 30, 2019**.

The second category is **Junior Member** which may be granted by the Executive Committee to individuals who are candidates on track to qualify for certification under one of the membership disciplines.

A third category is **Associate Member**: "other persons whose business or profession is related to estate planning and who may become members by approval of the executive committee." Dues for 2019-2020 are \$500 for Associate Members (\$550 after September 30th). An application form for Associate Membership is available upon request.

Enclosed is a membership renewal form. Please complete the enclosed form and return it along with your check **payable to "Estate Planning Council of Northeast Florida"** in the appropriate amount to the following address:

Estate Planning Council of Northeast Florida
9127 Ft. Caroline Road
Jacksonville, Florida 32225

Renewals may also be made through our web page at www.nefepc.org. Go to the Member Renewal link and follow the instructions.

Be sure to RSVP upon receipt of each meeting reminder email, including any guests you plan to bring. Guest fees are \$75.00 for dinner meetings and \$25

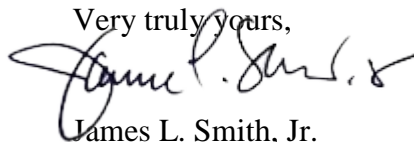
for lunch meetings. Guest fees are due at or before the meetings to the above address. We must guarantee our projected attendance in advance so the hosting facility knows how much food to prepare. If you accept and do not attend, ***we must still pay for your dinner/lunch***. Please inform us at least 3 days in advance if your plans change and you will not be able to attend.

Our banner and directory sponsorships for this year have been filled. Cocktail sponsorships at \$500 are available November 19, 2019 and January 21, 2020. One lunch sponsorship at \$250 is available March 17, 2020. These sponsorships are available on a first-come, first-served basis.

We are pleased to continue the ***New Member Reward Program***. An existing member who sponsors a new member will be awarded a check for ***\$50*** upon our receipt of the new member's dues. The member sponsoring the most new members will also receive a ***\$100*** gift certificate. EPC Officers and Executive Committee are ***not eligible***. To recommend someone for membership, complete the enclosed new member sponsor form and forward it to the above address.

Thank you for your support and participation in The Estate Planning Council of Northeast Florida. We look forward to a great year. If you have any questions, please feel free to contact me, anyone on the Executive Committee, or our Executive Secretary, Miriam Funchess. *We look forward to seeing you on September 10th!*

Very truly yours,

A handwritten signature in black ink, appearing to read "James L. Smith, Jr.", written in a cursive style.

James L. Smith, Jr.
President