



# EVENT CALENDAR 2018-2019

**5:15 Cocktails 6:00 Buffet Dinner 6:30 Speaker (CEUs) 7:30 Depart**

DATE (THURSDAY)	TOPIC	SPEAKERS	LOCATION
Sept. 20, 2018	CCEPC Season Opening Golf & BBQ-50/50 for CCEPC Scholarship Fund	Sponsor #1 Nemours Sponsor #2 Manning & Napier Sponsor #3 Gawthrop Greenwood	Tee It Up Golf, 21 Hagerty BLVD, West Chester, PA 19382
Oct. 11, 2018*	Tax Act of 2017: Implications for NOW	Panelists: Valerie Middlebrooks, CPA, Belfint Lyons and Shuman Marjorie Belliotti, CPA, CGMA Mallie William Bennett Cooper, Esq., Fox Rothschild Sponsor #1: Sponsor #2	Hershey's Mill Clubhouse
Nov. 1, 2018	Lunch & Learn Discussion: What's New In My Shop (lunch provided)	Sponsor #1 Fischer Cunnane	Fischer Cunnane 11 Turner Lane West Chester, PA 19380
Weds, Nov. 14, 2018 JOINT MEETING W/ DELAWARE EPC	An Analysis of Proposals Using Life Insurance: What Works, What May Not Be as Effective as Promoted, and What Does Not Work	Lawrence J. Macklin, Esq., CPA, AEP., NAEPC National Speaker- US Trust, Bank of America Private Wealth Management Sponsor #2 Kamelot Auctions	Wilmington Country Club, 4825 Kennett Pike, Wilmington, DE 19807
Dec. 6, 2018	HAPPY HOUR/NEW MEMBER RECRUITMENT	N/A Sponsor #2	Marquee Bar & Lounge 124 N. High St, WC
Jan. 17, 2019	HOLIDAY RECEPTION – BRING DONATION FOR CHARITY CANNED GOODS OR GIFT CARDS	Sponsor #1 Briggs Auction House Sponsor #2 Phoenixville Federal Bank & Trust	Faunbrook Bed & Breakfast, West Chester
Feb. 21, 2019*	Wealth, Inheritance and the \$40 Trillion Tsunami-Video Response Panel	Panelists: Michael A. DeHaven, CPA, Rainer & Co Louis N. Teti, Esq., MacElree Harvey Denise Wine, CFA, Connelly Moore Moderator: Beth Harper Briglia, CPA, CAP, ChesCo Community Foundation Sponsor #1 MacElree Harvey Sponsor #2 Fromhold Jaffe & Adams	Hershey's Mill Clubhouse
March 21, 2019	Lunch & Learn Discussion: What's New In My Shop (lunch provided)	Sponsor #1 DNB First	DNB First, 2 N. Church St., West Chester
April 18, 2019*	CCEPC Post-Tax Social	Sponsor #1 Connor, Weber & Oberlies Sponsor #2 Martin's Financial Consulting Group	Pietro's Prime
May 2, 2019	The Changing World of Estate Planning & Season's End BBQ-A. Stephen McDaniel, JD, AEP®, EPLS-NAEPC National Speaker-Williams McDaniel, PLLC	Sponsor #1 Umbreit Wileczek Sponsor #2 Simone Zajac Wealth Management Group Sponsor #3 SPONSOR NEEDED Sponsor #4 SPONSOR NEEDED	West Chester CC 111 W. Ashbridge Rd, WC

Questions? Contact  
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\*CCEPC Board meets from 4:15-5:15 in:  
 Oct, Nov, Feb & May