

# ▲▲ CHESTER COUNTY ▲ ESTATE PLANNING COUNCIL

28 West Market Street – West Chester, PA 19382

(610) 696-8211 Fax (610) 696-8213 [info@chescoepc.org](mailto:info@chescoepc.org)

Dear Colleague:

We at CCEPC look forward to an exciting year of professional development, service to the community and networking. We have lined up an impressive array of high quality speakers for our monthly meetings throughout the year.

We urge you to renew your membership and register for this year's meetings. As you know, our members enjoy many benefits including the directory, a superior line-up of speakers, continuing education credits, and the opportunity to network and socialize with friends and peers. Please join us:

## September 16, 2010

**5:30-8:00 at Hershey's Mill Clubhouse**

***"Economic Overview and Strategic Asset Allocation Review"***

**Speaker: Marcus Adams, Vice President and Wealth Management Investment Manager, Wells Fargo Private Bank and Darrell Cronk, CFA, Senior Director of Investments-Northeast & Penn/Del, Wells Fargo Private Bank**

**Sponsor: Wells Fargo Private Bank**

You can register on-line for dinner (\$40/dinner for members vs \$55 for nonmembers) and membership (\$75 annually).

For more info or to register:

[www.chescoepc.org](http://www.chescoepc.org)  
[info@chescoepc.org](mailto:info@chescoepc.org)  
(610) 696-8211

Sincerely,



Dean Walters, CTFA  
Wells Fargo Private Bank  
CCEPC President

### OFFICERS

Dean A. Walters, Esq.  
Wells Fargo Private Bank  
President

James J. Ruggiero, Esq.  
Ruggiero Law Offices  
Vice President

Stephen J. McGann  
First National Wealth Management  
Secretary

Paul R. Kopey, CPA, CFP, ChFC  
Paul R. Kopey & Associates  
Treasurer

Jordan N. Rosen, CPA, AEP  
Belfint, Lyons & Shuman, P.A.  
Immediate Past President

### DIRECTORS

Michelle J. Blass, CFP  
Millennium Wealth Management  
& Private Banking

Tina Cortese  
MacElree Harvey

Kim A. Fahrner  
Lau Associates

Sandra Mattern

Andrew J. Mone, Jr.  
DNB Advisors

Vera Parenti-Ancone, Esq.  
Gawthrop Greenwood, P.C.

Nancy W. Pine, Esq.  
Pine & Pine LLP

Salwa Raven, FSA, MAAA, EA  
S.G. Raven & Associates Consulting  
Actuaries

Marc Ridell, CPA  
Fischer Cunnane

Karen A. Simmons  
Chester County Community Foundation

Samuel Stroud, Jr.  
Legacy Planning Partners

Donna L. Urian, CPA  
Fischer Cunnane

Teresa Zwierzyna  
PNC Wealth Management

### ADMINISTRATOR

Michelle Thomas  
Chester County Community Foundation

# CCEPC EVENT CALENDAR 2010-2011

**\*September 16, 2010, 5:30-8:00** at Hershey's Mill Clubhouse

**"Economic Overview & Strategic Asset Allocation Review"** with Marcus Adams, Vice President & Wealth Management Investment Manager, Wells Fargo Private Bank and Darrell Cronk, CFA, Senior Director of Investments-Northeast & Penn/Del, Wells Fargo Private Bank

Sponsor: Wells Fargo Private Bank

**\*October 21, 2010, 5:30-8:00** at Hershey's Mill Clubhouse

**"Building Strategic Alliances that Will Take Your Business to New Heights"** with Beth Ruggiero, Climb High Consulting

Sponsor: L. Robert Frame, Esq., Coldwell Banker Preferred

**\*November 18, 2010, 5:30-8:00** at Hershey's Mill Clubhouse

**"Philanthropy in Estate Planning"** Panel with L. Peter Temple, Esq., J. Stoddard Hayes, Esq., and Louis N. Teti, Esq.

Sponsor: Chester County Community Foundation

**January 20, 2011, CCEPC Holiday Gathering** at Gawthrop Greenwood, PC.

Sponsor: Gawthrop Greenwood, PC (snow date 1/27)

**\*February 17, 2011, 5:30-8:00** at Hershey's Mill Clubhouse

**Past-Presidents' Dinner:** All CCEPC Past-Presidents are invited, compliments of CCEPC **"Ethical Issues We Face in Working with Clients with Diminished Capacity"** with Michele Mathes, JD, Director of Research Programs, Center for Advocacy for the Rights and Interests of the Elderly and Charlie Sabatino, American Bar Association Commission on Law and Aging

Sponsor: Ruggiero Law Offices

**\*March 17, 2011, 5:30-8:00** at Hershey's Mill Clubhouse

**"Preparing for Your Quarter Million Dollar Old Age"** with Carol Barbour, President/CEO, Friends Life Care System

Sponsor: Intervention Associates

**\*April 21, 2011, 5:30-8:00** at Hershey's Mill Clubhouse

**"What's the Value/Working with an Auction Appraiser"** with Freeman's Auctioneers

Sponsor: The Philadelphia Foundation

**June 6, 2011, Golf at Hershey's Mill ~ Culture Outing at the Mill at Anselma**

Culture Sponsor: Belfint, Lyons & Shuman, P.A.

Golf Sponsors: NEEDED.

*\*CCEPC Board meeting, 4:30-5:30 prior to CCEPC dinner meeting 5:30-8:00 p.m.*

## Save these Dates! CCEPC 2011/12

Sept. 15, 2011

Oct. 20, 2011

Nov. 17, 2011

January x, 2012 Holiday Reception

Feb. 16, 2012

March 15, 2012

Apr. 19, 2012

June 4, 2012 Golf



### Contact:

Chester County Estate Planning Council  
28 West Market Street - West Chester, PA 19382  
(610) 696-8211 (610) 696-8213 fax

[info@chescoepc.org](mailto:info@chescoepc.org)

[www.chescoepc.org](http://www.chescoepc.org)

[click here for CCEPC secure credit card link](#)

# ▲ CHESTER COUNTY ▲ ESTATE PLANNING COUNCIL

28 West Market Street – West Chester, PA 19382

(610) 696-8211 Fax (610) 696-8213 [info@chescoepc.org](mailto:info@chescoepc.org) [www.chescoepc.org](http://www.chescoepc.org)

## DINNER MEETING RESERVATION

**SAVE TIME! REGISTER ONLINE AT [www.chescoepc.org](http://www.chescoepc.org)**

**Yes, I will attend the following meetings.**

**\*\*Sign up for the whole year and receive a 10% discount\*\***

- \_\_\_\_ Sept 16, 2010, 5:30-8:30 @ Hershey's Mill w/Economy with Adams/Cronk-Wells Fargo  
\_\_\_\_ Oct 21, 2010, 5:30-8:30 @ Hershey's Mill/Business Alliances with Ruggiero/Frame-Coldwell  
\_\_\_\_ Nov 18, 2010, 5:30-8:30 @ Hershey's Mill/Philanthropy with Hayes, Temple & Teti /CCCF  
\_\_\_\_ Jan 20, 2011 Holiday Reception @ Gawthrop Greenwood PC/Gawthrop Greenwood  
\_\_\_\_ Feb 17, 2011, 5:30-8:30 @ Hershey's Mill/Ethical Issues with Mathes & Sabatino + PAST  
PRESIDENTS DINNER/Ruggiero  
\_\_\_\_ March 17, 2011, 5:30-8:30 @ Hershey's Mill/Quarter Million \$ Old Age with Barbour/Intervention  
\_\_\_\_ April 21, 2011, 5:30-8:30 @ Hershey's Mill/Appraisals with Freeman's/Phila Foundation  
(June 6, 2011, Year-End Golf Culture Outing and BBQ @ Hershey's Mill; separate prices will apply)

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Yes, I would like to receive Continuing Education Units**

**I require the following units (CLE, CLU, CPA, etc.): \_\_\_\_\_**

### **PAYMENT:**

- \$320: Sign me up for the full year: 7 dinners at \$35 (10% discount) = \$245 plus annual membership at \$75 = \$320
- \$40 for one dinner (member rate)
- \$45 for walk-ins night of and those who have not reserved by Friday before meeting date
- \$55 for one dinner (non-member rate)
- \$75 annual membership
- \$250 to sponsor a meeting. Meeting date: \_\_\_\_\_
- Other amount: \$ \_\_\_\_\_ for \_\_\_\_\_ # of dinners
- Check enclosed     Charge my credit card    \_\_\_\_\_ Visa    \_\_\_\_\_ Mastercard

Name on card: \_\_\_\_\_

Credit Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ Security PIN: \_\_\_\_\_

**SAVE TIME! REGISTER ONLINE AT [www.chescoepc.org](http://www.chescoepc.org)**