

# ▲ 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)

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, register for this year's meetings, and sponsor a program. 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**

**Sponsor: Wells Fargo Private Bank**

You can register on-line for dinner (\$39/dinner for members vs \$55 for non-members), membership (\$75 annually), and sponsorship (\$250). Sponsors receive listing on CCEPC event calendars, plus can make a brief 5 minute presentation at the dinner meeting and distribute materials.

For more info or to register:

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

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

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

(610) 696-8211

Sincerely,



Dean Walters, CTFA  
Wells Fargo Private Bank  
CCEPC President

## OFFICERS

Dean A. Walters, Esq.  
Wells Fargo Private Bank  
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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

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Immediate Past President

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& Private Banking

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Chester County Community Foundation

Samuel Stroud, Jr., CFP  
Legacy Planning Partners

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Fischer Cunnane & Associates Ltd.

Teresa Zwierzyna  
PNC Wealth Management

## ADMINISTRATOR

Pamela Carter  
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

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., David M. Frees, III, Esq., J. Stoddard Hayes, Esq., and Louis N. Teti, Esq.

Sponsor: Chester County Community Foundation

**January 20, 2011, 5:30-8:00, CCEPC Holiday Gathering** at Gawthrop Greenwood

Sponsor: Gawthrop Greenwood (*Note: Snow date 1/27*)

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

**Past-President's 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 & Charles Sabatino, Director of the American Bar Association's 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: NEEDED.

**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 Date Line Up

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 Information:

Chester County Estate Planning Council  
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## 2010- 2011 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\*\***

- \_\_\_ September 16, 2010 5:30-8:30 @ Hershey's Mill – Economic Forecast with Adams
- \_\_\_ October 21, 2010 5:30-8:30 @ Hershey's Mill – Business Alliances with Ruggiero
- \_\_\_ November 18, 2010 5:30-8:30 @ Hershey's Mill – Philanthropy with Frees, Hayes, Temple & Teti
- \_\_\_ January 20, 2011, 5:30-8:30 (Jan. 27 snowdate) @ Gawthrop Greenwood - Holiday Reception
- \_\_\_ February 17, 2011, 5:30-8:30 @ Hershey's Mill – Ethical Issues with Mathes, Sabatino
- \_\_\_, March 24, 2011, 5:30-8:30 @ Hershey's Mill – Quarter Million Old Age with Barbour
- \_\_\_ April 21, 2011 5:30-8:30 @ Hershey's Mill – Appraisals with Freeman's
- \_\_\_ June 7, 2011, Year-End Golf Culture Outing and BBQ at Hershey's Mill  
(separate prices, see below)

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

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

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

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

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

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

**PAYMENT:** *Reservations due prior Friday, \$55 rate charged for walk-ins without reservations. No refunds for cancellations after prior Friday; will credit payment toward future events.*

- \$320: Sign me up for the full year: 7 dinners at \$35 (10% discount) = \$245 + membership at \$75
- \$39 for one dinner reservation made and paid 7 days prior to event (member rate)
- \$55 for one dinner (non-member and day of event walk in rate)
- \$75 annual membership 2011

### GOLF/CULTURE OUTING

- \$575 for 6/7/2011 Golf Foursome (includes open bar & BBQ)
- \$150 for 6/7/2011 Member Golf
- \$50 for 6/7/2011 Open Bar and BBQ only
- \$175 for 6/7/2011 Non-Member Golf
- \$75 for 6/7/2011 Culture Outing, Bar & BBQ

TOTAL PAYMENT: \$ \_\_\_\_\_

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)