



28 W. Market Street – West Chester PA 19382
(610) 696-8211 info@chescoepc.org 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 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 15, 2011

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

"The Delaware Advantage: Asset Protection Trusts"

Speaker: Jeffrey C. Wolken, Esq., Vice President, Wealth Advisory Services, Wilmington Trust Company

Please register on-line for dinner (\$40/dinner for members vs \$55 for nonmembers) and membership (\$90 annually).

For more info or to register:

www.chescoepc.org
info@chescoepc.org
(610) 696-8211



Sincerely,

James J. Ruggiero, Jr., Esq., AEP®
Ruggiero Law Offices LLC
President, CCEPC

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ADMINISTRATOR

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Chester County Community Foundation

CCEPC EVENT CALENDAR 2011-2012

*September 15, 2011, 5:30-8:00 at Hershey's Mill Clubhouse

"The Delaware Advantage: Asset Protection Trusts" with Jeffrey C. Wolken, Esq., Vice President Wealth Advisory Services, Wilmington Trust Company

Sponsor: **Sponsor Needed**

October 20, 2011, 5:30-8:00 at Hershey's Mill Clubhouse

"Buy Sell Agreements from the Business Appraiser's Standpoint" with Edward A. Wilusz, ASA, CFA, Managing Director of Value Management, Inc.

Sponsor: **Sponsor Needed**

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

"Using Charitable Trusts in Estate Planning: Traps for the Unwary" with Richard S. Caputo, Esq., Partner, Fox Rothschild LLP

Sponsor: **Sponsor Needed**

January 12, 2012, CCEPC Holiday Gathering at Bunch's Auction House, Chadds Ford, PA

Sponsor: **Bunch's Auction House**



*February 16, 2012, 5:30-8:00 at Hershey's Mill Clubhouse

Past-Presidents' Dinner: All CCEPC Past-Presidents are invited, compliments of CCEPC
"Harrisburg Update: How It Affects Your Practice" with Edward M. Waters III, Esq., Partner, Pepper Hamilton LLP

Sponsor: **Sponsor Needed**



March 15, 2012, 5:30-8:00 at Hershey's Mill Clubhouse

NATIONAL SPEAKER: MORE INFO TO BE ANNOUNCED SOON!

Sponsor: **Sponsor Needed**

*April 19, 2012, 5:30-8:00 at Hershey's Mill Clubhouse

"Life Planning, Special Needs Trust and Care Management: adults with mental illness, autism, intellectual disabilities or brain injury" with Ginny Koehler, Executive Director of Plan of PA.

Sponsor: **Sponsor Needed**

June 4, 2012, Golf at Hershey's Mill ~ Culture Outing

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

Golf Sponsors: **Sponsors Needed, Separate Rates Apply**

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

Save **these Dates! CCEPC 2012/13**

Sept. 13, 2012

Oct. 18, 2012

Nov. 15, 2012

January x, 2013 Holiday Reception

Feb. 14, 2013

March 14, 2013

Apr. 18, 2013

June 3, 2013 Golf

Contact:

Chester County Estate Planning Council
28 West Market Street - West Chester, PA 19382
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[click here for CCEPC secure credit card link](#)



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DINNER MEETING RESERVATION

SAVE TIME! REGISTER ONLINE AT www.chescoepc.org

Yes, I will attend the following meetings.

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

- ___ Sept 15, 2011, 5:30-8:30 @ Hershey's Mill/ DE Advantage with Wolken
 - ___ Oct 20, 2011, 5:30-8:30 @ Hershey's Mill/ Buy Sell Agreements with Wilusz
 - ___ Nov 17, 2011, 5:30-8:30 @ Hershey's Mill/Charitable Trusts with Caputo
 - ___ Jan 12, 2012 Holiday Reception @ Bunch's Auction House
 - ___ Feb 16, 2012, 5:30-8:30 @ Hershey's Mill/ Harrisburg Update with Watters + PAST PRESIDENTS DINNER
 - ___ March 15, 2012, 5:30-8:30 @ Hershey's Mill/ TBA
 - ___ April 19, 2012, 5:30-8:30 @ Hershey's Mill/ Life Planning with Koehler
- (June 4, 2012, 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:

- \$342: Sign me up for the full year: 7 dinners at \$40 (10% discount) = \$252 plus annual membership at \$90 = \$342**
 - \$306 PAST PRESIDENTS ONLY: 6 dinners at \$40 (10% discount; plus free Feb President's Dinner) = \$216 plus annual membership \$90 = \$306**
 - \$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)
 - \$90 annual membership
 - \$350 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