



28 W. 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)

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 the whole year of meetings**. Our members enjoy a superior line-up of speakers, continuing education credits, and the opportunity to network and socialize with friends and peers.

Please register on-line for **dinner** (\$40 per dinner for members vs. \$55 for non-members) and **membership** (\$100 annually). We urge you to **sign up for membership + dinners for the whole year**. (You are free to send substitutes if necessary.)

CCEPC seeks up to **2** sponsors per meeting, and **4** for the annual meeting. For only **\$375**, CCEPC sponsors receive:

- ✓ recognition nametag
- ✓ logo included on 8x10" display at each dinner table & bar area
- ✓ materials at guest tables
- ✓ 1-minute announcement
- ✓ 1 dinner for the event
- ✓ sponsor listing on year-long program fliers, website & evites

For more info and/or to register:

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



See you in at CCEPC!

Timothy Zeigler  
 Kamelot Auction House  
 President, CCEPC

**BOARD OFFICERS  
 2016-2017**

Timothy Zeigler  
 Kamelot Auction House  
 President

Mary Hopkins, JD  
 Nemours Fund for Children's Health  
 Vice President

Kathy Dean-Bradley, CPA  
 Belfint, Lyons & Shuman, P.A.  
 Secretary

John F. McKenna, Esq.  
 MacElree Harvey, Ltd.  
 Treasurer

Samuel S. Stroud, CFP  
 Legacy Planning Partners  
 Immediate Past President

**DIRECTORS**

Denise Antonelli, Esq.  
 Gawthrop Greenwood

William Bennett Cooper, III, Esq.  
 Fox Rothschild, LLP

Jennifer Damelio, Esq.  
 Friedman Schuman

Robert D. Fischer, Esq., CPA, LL.M.  
 Fischer Cunnane & Associates, Ltd.

Joey Fowkes  
 American Cancer Society

Michael B. Karwic, CFP®, CRPC  
 Iron Valley Wealth Management

Kurt Kunsch  
 Phoenixville Federal Bank & Trust

Bronwyn Martin, Ph.D., MBA, CFS,  
 CRPC, CMFC, CLU, ChFC, AEP  
 Martin's Financial Consulting Group

Peter Reitmeyer  
 Manning & Napier

Sheree Richnow  
 Richnow LifeStyle Transitions

Kathleen Wileczek, CPA  
 Umbreit Korengel & Associates

James E. Yiaski, CPA  
 Maillie LLP

Teresa Zwierzyna, CTFA  
 Christiana Trust

**ADMINISTRATORS**

Chester County Community Foundation  
 Fiscal Agent:  
 Robert Ferguson  
 Kevin Baffa



# EVENT CALENDAR 2016-2017

5:30 Cocktails 6:15 Buffet Dinner 7:00 Speaker (CEUs) 8:00 Depart

DATE (THURSDAY)	TOPIC	SPEAKERS	LOCATION
Sept. 15, 2016*	<b>Behind Closed Doors: Getting a Handle on Hoarding</b>	Margit Novak, Moving Solutions	Hershey's Mill Clubhouse
Sponsor #1 Kamelot Auction House		Sponsor #2 Gawthrop Greenwood	
Sept. 29, 2016	<b>HAPPY HOUR/New Member Recruitment in West Chester</b>		Iron Hill Brewery
Sponsor #1 SPONSOR NEEDED		Sponsor #2 SPONSOR NEEDED	
Oct. 13, 2016*	<b>Impact of Presidential Elections on Estate Planning &amp; Markets</b>	Marc Pouey, MBA, Merrill Lynch Global Research	Hershey's Mill Clubhouse
Sponsor #1 MacElree Harvey		Sponsor #2 Karakelian/Snelling Group at Merrill Lynch	
Nov. 3, 2016	<b>Exploring Estate Planning Careers: Panel Discussion</b>	Volunteers needed from CCEPC to speak with WCU Business students: accounting, banking, insurance, law, wealth management	West Chester University: Building Rm TBD
Wed., Nov. 9, 2016 <b>JOINT MEETING WITH DELAWARE EPC !!!</b>	<b>The State of the Arts Market</b>	Carolyn B. Nagy, Sotheby's Philadelphia	Wilmington Country Club, 4825 Kennett Pike, Wilmington, DE 19807
Sponsor #1 The Hickman		Sponsor #2 Belfint, Lyons & Shuman, CPA	
Jan. 19, 2017	<b>HOLIDAY RECEPTION – BRING DONATION FOR CHARITY CANNED GOODS OR GIFT CARDS + DONATION JAR FOR CCEPC SCHOLARSHIP FUND</b>		DNB First 2N Church St. West Chester 19380
Sponsor #1 DNB First		Sponsor #2 MacElree Harvey	
Feb. 16, 2017*	<b>This Year's Top Estate Planning &amp; Estate Tax Developments</b>	<u>Moderator:</u> Denise Antonelli, Esq., Gawthrop Greenwood <u>Panelists:</u> Michael Briglia, CPA, CFA, Pillar Wealth Advisors William Bennett Cooper, Esq., Fox Rothschild Dean Walters, Esq., The Philadelphia Trust Company	Hershey's Mill Clubhouse
Sponsor #1 Phoenixville Federal Bank & Trust		Sponsor #2 Gawthrop Greenwood	
March 23, 2017	<b>HAPPY HOUR/New Member Recruitment in Exton</b>		Exton Location TBD
Sponsor #1 Manning & Napier		Sponsor #2 SPONSOR NEEDED	
April 20, 2017*	<b>Divorce and Estate Planning – Breaking Up is Hard to Do</b>	<u>Moderator:</u> Jennifer Kosteva, Esq., Heckscher, Teillon, Terrill & Sager <u>Panelists:</u> John A. Terrill, Esq., Heckscher, Teillon, Terrill & Sager Donna Urian, CPA, Fischer Cunnane Kimberly J. Krzyzaniak, Esq.	Hershey's Mill Clubhouse
Sponsor #1 American Cancer Society		Sponsor #2 Legacy Planning Partners	
May 18, 2017	<b>Annual Meeting &amp; Season's End BBQ: Wills of the Rich &amp; Famous</b>	Edward Perkins, BA, JD, LLM, CPA, Gibson & Perkins	Hershey's Mill Clubhouse
Sponsor #1 Umbreit Korengel, CPAs		Sponsor #2 SPONSOR NEEDED	
Sponsor #3 SPONSOR NEEDED		Sponsor #4 SPONSOR NEEDED	

**Questions? Contact**  
ChesCo EPC  
28 W. Market St., West Chester 19382  
(610) 696-8211 (610) 696-8213 fax  
[info@chescoepc.org](mailto:info@chescoepc.org) [www.chescoepc.org](http://www.chescoepc.org)

\*CCEPC Board meets from 4:30-5:30 in:  
Sept, Oct, Feb & April



28 W. Market Street  
 West Chester PA 19382  
 (610) 696-8211  
[info@chescoepc.org](mailto:info@chescoepc.org)  
[www.chescoepc.org](http://www.chescoepc.org)

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

**Yes, I will attend these meetings, which take place from 5:30-8:00.**  
**Sign up for the whole year! Rates as of 1-20-17**

DATE	TOPIC	COST	SITE
___Sept. 15, 2016	Getting a Handle on Hoarding	\$40/55	Hershey's Mill
___Sept. 29, 2016	HAPPY HOUR/New Member Recruitment	\$20/20	Iron Hill, West Chester
___Oct. 13, 2015	Presidential Elections & Estate Planning	\$40/55	Hershey's Mill
___Nov. 9, 2016	The State of the Arts Market	\$40/55	Wilmington CC
___Jan. 19, 2017	<b>HOLIDAY RECEPTION</b>	\$40/55	DNB First, West Chester
___Feb. 16, 2017	Top Estate Planning & Estate Tax Developments	\$40/55	Hershey's Mill
___March 23, 2017	HAPPY HOUR/New Member Recruitment	\$20/20	Exton TBD
___April 20, 2017	Divorce & Estate Planning	\$40/55	Hershey's Mill
___May 18, 2017	Wills of the Rich & Famous	\$40/55	Hershey's Mill
___CCEPC Dues	Annual CCEPC Membership Dues	\$100	-

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

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

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

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

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

**PAYMENT:**

- \$240** sign me up for the rest of the program year: (3 meetings @ \$40 = \$120) + (1 happy hour= \$20) + (annual membership at \$100) = \$240
- \$ 40** one dinner @member rate
- \$ 55 walk-ins night of and those who have not reserved by Friday before meeting date
- \$ 55 one dinner @non-member rate
- \$100** annual membership
- \$375 meeting sponsor. Desired meeting date: \_\_\_\_\_
- Other amount: \$ \_\_\_\_\_ for \_\_\_\_\_ # of dinners
- Check enclosed  Charge my credit card \_\_\_\_\_ Visa \_\_\_\_\_ MasterCard \_\_\_\_\_ AmEx

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

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

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