

28 W. Market Street, West Chester PA 19382
 (610) 696-8211 (610) 696-8213 fax
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 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. Be sure to join us for our first event of the year:



Thurs. Sept. 15th 2016
5:30-8:00 at Hershey's Mill
BEHIND CLOSED DOORS:
GETTING A HANDLE ON HOARDING
BY MARGIT NOVACK

Please register on-line for **dinner** (\$40 per dinner for members vs. \$55 for non-members) and **membership** (\$100 annually). **Save 10% when you 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:

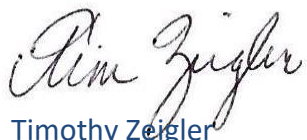
- ✓ recognition nametag
- ✓ logo included on 8x10" display at each dinner table & bar area
- ✓ materials at guest tables
- ✓ 1-minute announcement
- ✓ 1 dinner for the event
- ✓ sponsor listing on year-long program fliers, website & evites

For more info and/or to register:

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



See you in September!



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
 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
 PNC Wealth Management

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*	Behind Closed Doors: Getting a Handle on Hoarding	Margaret Novak, Moving Solutions	Hershey's Mill Clubhouse
Sponsor #1: Kamelot Auction House		Sponsor #2: SPONSOR NEEDED	
Sept. 29, 2016	HAPPY HOUR/New Member Recruitment in West Chester		Iron Hill Brewery
Sponsor #1 SPONSOR NEEDED		Sponsor #2 SPONSOR NEEDED	
Oct. 13, 2016*	Impact of Presidential Elections on Estate Planning & Markets	Marc Pouey, MBA, Merrill Lynch Global Research	Hershey's Mill Clubhouse
Sponsor #1 SPONSOR NEEDED		Sponsor #2 SPONSOR NEEDED	
Nov. 3, 2016	Exploring Estate Planning Careers: Panel Discussion	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 JOINT MEETING WITH DELAWARE EPC !!!	The State of the Arts Market	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	HOLIDAY RECEPTION – BRING DONATION FOR CHARITY CANNED GOODS OR GIFT CARDS + DONATION JAR FOR CCEPC SCHOLARSHIP FUND		DNB First 2N Church St. West Chester 19380
Sponsor #1 DNB First		Sponsor #2 SPONSOR NEEDED	
Feb. 16, 2017*	This Year's Top Estate Planning & Estate Tax Developments	<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 SPONSOR NEEDED	
March 23, 2017	HAPPY HOUR/New Member Recruitment in Exton		Exton Location TBD
Sponsor #1 SPONSOR NEEDED		Sponsor #2 SPONSOR NEEDED	
April 20, 2017*	Divorce and Estate Planning – Breaking Up is Hard to Do	<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. Christine Palmer Hennigan, 1847 Financial	Hershey's Mill Clubhouse
Sponsor #1 SPONSOR NEEDED		Sponsor #2 SPONSOR NEEDED	
May 18, 2017	Annual Meeting & Season's End BBQ: Wills of the Rich & Famous	Edward Perkins, BA, JD, LLM, CPA, Gibson & Perkins	Hershey's Mill Clubhouse
Sponsor #1: SPONSOR NEEDED		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 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
www.chescoepc.org

CCEPC DINNER MEETING RESERVATION
SAVE TIME! REGISTER ONLINE AT www.chescoepc.org

Yes, I will attend these meetings, which take place from 5:30-8:00.
Sign up for the whole year! 10% discount!

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	DEPC to host - TBD
___ Jan. 19, 2017	HOLIDAY RECEPTION	\$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:

- \$392 sign me up for the full year: 7 meetings @ \$40 (- 10% discount) + 2 happy hours @ \$20 = \$292 + annual membership at \$100 = \$392**
- \$356 Past Presidents only: 6 dinners at \$40 (-10% discount + free Feb President's Dinner) + 2 happy hours @\$20 = \$256 plus annual membership at \$100 = \$356
- \$ 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