



EVENT CALENDAR 2017-2018

JOIN US AT CCEPC
DINNER MEETINGS—LUNCH & LEARN—
COFFEE CHATS—HAPPY HOURS

2017	2018	2019
Sept 28 Dinner	Jan 17 Holiday Reception @Uptown! Theater	Feb 19 Past Presidents' Dinner
Oct 5 Happy Hour	Feb 19 Past Presidents' Dinner	March 6 Coffee Chat @8:30
Oct 19 Dinner	March 6 Coffee Chat @8:30	March 21 Happy Hour
Oct 31 Lunch & Learn @noon	March 21 Happy Hour	April 19 Dinner
Nov 7 Dinner w/ Delaware EPC	May 7 Annual Meeting & Season's End Social	

CCEPC 28 W. Market Street West Chester PA 19382
(610) 696-8211 info@chesoepec.org www.chesoepec.org

NEW TIMES! 5:15 Cocktails 6:00 Buffet Dinner 6:30 Speaker (CEUs) 7:30 Depart

DATE (THURSDAY)	TOPIC	SPEAKERS	LOCATION
Sept. 28, 2017*	Transition by Design: Successful Succession of Privately Held Businesses	Susan P. Rounds, JD, CPA, LLM., AEP, TEP, Deutsche Bank Trusts , Los Angeles, CA, NAEPC National Speaker	Hershey's Mill Clubhouse
Sponsor #1 Changing Times Home Services		Sponsor #2 Chester County Community Foundation	
Oct. 19, 2017*	Perspectives on Health Care Directives	<u>Panelists:</u> Dr. Elissa Miller, MD, Nemours Donna S. Taylor, NHA, Kendal-Crosslands Communities Peter Temple, Esq., Larmore & Scarlett, LLP	Hershey's Mill Clubhouse
Sponsor #1 MacElree Harvey		Sponsor #2 Nemours	
Oct. 30, 2017 @5:30-6:30 pm	Exploring Estate Planning Careers: Panel Discussion		West Chester University: Building Rm TBD
Oct. 31, 2017 Noon-1	Lunch & Learn Discussion: What's New In My Shop (lunch provided) <i>(KK facilitate)</i>		Phoenixville Federal Bank & Trust, 564 Nutt Road, Phoenixville
Sponsor #1 Phoenixville Federal Bank & Trust			
Tues, Nov. 7, 2017 JOINT MEETING W/ DELAWARE EPC	Wealth Management & Planning Across Generations	Matt Pritzkur & Robert Hart, CFP, Bernstein	Wilmington Country Club, 4825 Kennett Pike, Wilmington, DE 19807
Sponsor #1 SPONSOR NEEDED		Sponsor #2 SPONSOR NEEDED	
Thurs, Nov. 16 th	HAPPY HOUR/NEW MEMBER RECRUITMENT	N/A	Pietro's Prime, 125 W. Market St., West Chester
Sponsor #1 SPONSOR NEEDED		Sponsor #2 SPONSOR NEEDED	
Jan. 18, 2018	HOLIDAY RECEPTION – BRING DONATION FOR CHARITY CANNED GOODS OR GIFT CARDS + DONATION JAR FOR CCEPC SCHOLARSHIP FUND		Uptown! Entertainment Alliance, West Chester
Sponsor #1 Umbreit Korengel		Sponsor #2 Martin's Financial Consulting Group	
Feb. 15, 2018*	Donor Advised Funds, Charitable Trusts & Private Foundations: What's Best for Your Charitably Minded Client?	<u>Panelists:</u> Beth Harper Briglia, CAP, ChesCo Community Foundation Jacqueline Motyl, Esq., Fox Rothschild Cindy VanAmburgh, CAP, Vanguard Charitable <u>Moderator:</u> Robert P. Wermuth, CLU, ChFC, Legacy Planning Partners	Hershey's Mill Clubhouse
Sponsor #1 American Heart Association		Sponsor #2 Kamelot Auction House	
March 6, 2018 8:30-9:30 AM	Coffee & Catch Up Discussion: What's New In My Shop <i>(KAS facilitate)</i>		Gawthrop Greenwood, 17 E. Gay St., West Chester
Sponsor #1 Gawthrop Greenwood			
March 22, 2018	HAPPY HOUR/New Member Recruitment in West Chester		TBC Sidebar, West Chester
Sponsor #1 SPONSOR NEEDED		Sponsor #2 SPONSOR NEEDED	
April 19, 2018*	The Renaissance of Single-Stock Concentration Risk Management	Tom Boczar & Elizabeth Ostrander, CFA, Intelligent Edge Advisors, NYC	Hershey's Mill Clubhouse
Sponsor #1 SPONSOR NEEDED		Sponsor #2 SPONSOR NEEDED	
May 7, 2018 Noon-1	Lunch & Learn Discussion: What's New In My Shop (lunch provided) <i>(KDB facilitate)</i>		MacElree Harvey, 17 W. Miner St., West Chester
Sponsored by Belfint Lyons & Shuman & MacElree Harvey			
May 17, 2018	Annual Meeting & Season's End Social & BBQ 52 driving range ports (covered) + mini golf + Hood's BBQ Truck Outdoor event (with inside reserved in case of rain)		Tee It Up Golf 21 Hagerty Blvd, WC teeitup12@live.com (610) 429-0800
Sponsor #1 Nemours		Sponsor #2 Manning & Napier	
Sponsor #3 SPONSOR NEEDED		Sponsor #4 SPONSOR NEEDED	

Questions? Contact
Chester County Estate Planning Council
 28 W. Market St., West Chester 19382
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info@chesoepec.org www.chesoepec.org

*CCEPC Board meets from 4:15-5:15 in:
 Sept, Oct, Feb & April