



EVENT CALENDAR 2019-2020

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

DATE (THURSDAY)	TOPIC	SPEAKERS	LOCATION
Sept. 26, 2019	Recent Developments & Common Mistakes in Special Needs Trusts	Dennis McAndrews, Esq.- McAndrews Law Offices, PC	Penn Oaks Golf Club 150 Penn Oaks Drive, West Chester
Sponsor #1 DNB First		Sponsor #2 The American College of Financial Services	
Oct. 24, 2019	The Morphing of Our Long Term Safety Nets	Linda Anderson, Esq.- Anderson Elder Law	Hershey's Mill Clubhouse
Sponsor #1: First Resource Bank		Sponsor #2 Phoenixville Federal Bank & Trust	
Nov. 14, 2019 JOINT MEETING W/ DELAWARE EPC	Transition by Design	Susan Rounds, JD, CPA, LL.M, AEP, TEP- Deutsche Bank	Wilmington Country Club, 4825 Kennett Pike, Wilmington, DE 19807
Sponsor #1 Belfint Lyons & Shuman		Sponsor #2 Gawthrop Greenwood	
Dec. 3, 2019	HOLIDAY RECEPTION – BRING DONATION FOR CHARITY CANNED GOODS OR GIFT CARDS		Faunbrook Bed & Breakfast, West Chester
Sponsor #1 Briggs Auctions, Inc.		Sponsor #2 Fromhold Jaffe & Adams	
Feb. 20, 2020	Past Presidents Dinner-A New Form of Asset Protection Trusts	Jonathan Blattmachr, Esq.- Pioneer Wealth Partners	Hershey's Mill Clubhouse
Sponsor #1 MacElree Harvey		Sponsor #2 Gawthrop Greenwood	
March 11, 2020	Lunch & Learn Discussion: What's New In My Shop (lunch provided)		MacElree Harvey, 17. W Miner Street., West Chester
Sponsor #1 MacElree Harvey			
April 23, 2020*	CCEPC Post-Tax Social		Pietro's Prime
Sponsor #1 Umbreit Wileczek		Sponsor #2 Martin's Financial Consulting Group	
May 14, 2020	"You be the Appraiser" & Season's End BBQ w/ Kamelot Auctions, Freeman's, Bunch Auctions & Briggs' Auction House		Hershey's Mill Clubhouse
Sponsor #1 Briggs Auctions, Inc Sponsor #3 Freeman's		Sponsor #2 Bunch Auctions Sponsor #4 Kamelot Auctions	

Questions? Contact
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*CCEPC Board meets from 4:15-5:15 in:
 Sept, Oct, Feb & May