



EVENT CALENDAR 2020-2021

5:00 Welcome and Announcements 5:30 Speaker 6:30 Program Conclusion 6:35 Optional Break Out Rooms

DATE (THURSDAY)	TOPIC	SPEAKERS	LOCATION
Sept. 17, 2020	Orphans Court Panel: Current Events & COVID	Hon. Mark Tunnell, Hon. Bret Binder & Hon. Katherine Platt-Chester County Orphans Court	Zoom
Sponsor #1 Phoenixville Federal Bank & Trust		Sponsor #2 MacElree Harvey	
Oct. 29, 2020	Opening the Door to Charitable Giving	Dave Frees, III, Esq.-Unruh Turner Burke & Frees	Zoom
Sponsor #1: Unruh Turner Burke & Frees		Sponsor #2 Maillie	
Nov. 12 2020	Overview of Cares & Secure Tax Acts	Jack P. Garniewski, CPA/PFS, CFP, AEP-Family Office Solutions, LLC, NAEPC President	Zoom
Sponsor #1 TBD		Sponsor #2 TBD	
Dec. 10, 2020	HOLIDAY RECEPTION – BRING DONATION FOR CHARITY CANNED GOODS OR GIFT CARDS		Faunbrook Bed & Breakfast, West Chester
Sponsor #1 Umbreit Wileczek & Associates		Sponsor #2 TBD	
Jan 14, 2021	Virtual Lunch & Learn: How to Market Your Firm	Kristen Stewart-Nousoma Communications	12:00-1:00 pm Zoom
Sponsor #1 Fromhold Jaffe & Adams			
Feb. 18, 2021	Economic Outlook	Ryotaro Tashiro-The Federal Reserve Bank of Philadelphia	Zoom
Sponsor #1 Belfint Lyons & Shuman		Sponsor #2 TBD	
March 18, 2021	Lunch & Learn Discussion: What's New In My Shop (lunch provided)		Phoenixville Federal Bank & Trust
Sponsor #1 Phoenixville Federal Bank and Trust			
April 22, 2021*	CCEPC & Delco EPC Post-Tax Social	5:00-7:30	PJ Whelihans, Newtown Square-4803 West Chester Pike, Newtown Square, PA 19073
Sponsor #1 Martin's Financial Consulting Group		Sponsor #2	
May 13, 2021	"You be the Appraiser" & Season's End BBQ w/ Kamelot Auctions, Freeman's, Bunch Auctions & Briggs' Auction House-Annual Meeting & Past Presidents Dinner		Hershey's Mill Clubhouse
Sponsor #1 Briggs Auctions, Inc		Sponsor #2 Bunch Auctions	
Sponsor #3 Freeman's		Sponsor #4 Kamelot Auctions	