



EVENT CALENDAR 2022-2023

5:15 Cocktail Reception 6:00 Announcements & Dinner 6:30 Program Starts 7:30 Program Conclusion/Wine Raffle & 50/50 Drawing

DATE	TOPIC	SPEAKERS	LOCATION
Sept. 15, 2022	Top 10 Challenges of Sudden Wealth	Michael Karwic, CFP, AEP, CRPC, CeFT- Sudden Money Institute	West Chester Golf & Country Club 111 W. Ashbridge Street West Chester, PA 19380
Sponsor #1 Umbreit Wileczek & Associates		Sponsor #2 American Cancer Society	
Oct. 13, 2022	Dealing With Difficult Clients Panel	Moderator: Matthew Gilbert, Esq.- Gadsden, Schneider & Woodward Panelists: Robert Burke, Esq.- MacElree Harvey Denise Wine- Morgan Stanley Wealth Management Kevin Hott, CFP- Truist Ed Fronczkowski, CPA- Maillie	West Chester Golf & Country Club 111 W. Ashbridge Street West Chester, PA 19380
Sponsor #1: Phoenixville Federal Bank & Trust		Sponsor #2 MacElree Harvey	
Nov. 2, 2022	Lunch & Learn Discussion: What's New In My Shop (lunch provided)		S&T Bank 2 N. Church Street West Chester, PA 19380
December 7, 2022	HOLIDAY RECEPTION – BRING DONATION FOR CHARITY GIFT CARDS ONLY		Radley Run Mansion House 1100 Country Club Road West Chester, PA 19382
Sponsor #1 TBD		Sponsor #2 TBD	
Feb. 23, 2023	Senior Safe-Preventing Elder Financial Abuse & Past Presidents' Dinner	Katrina Boyer & Christina Kotsalos-Pa Department of Banking & Securities	West Chester Golf & Country Club 111 W. Ashbridge Street West Chester, PA 19380
Sponsor #1 Gawthrop Greenwood		Sponsor #2 Special Journey Solutions	
March 23, 2023	Lunch & Learn Discussion: What's New In My Shop (lunch provided)		Larmore Scarlett 203 N. Union Street Kennett Square, PA 19348 Phoenixville Federal Bank & Trust 564 Nutt Road Phoenixville, PA 19460
April 20, 2023	CCEPC & Delco EPC Post-Tax Social		PJ Whelihans, Newtown Square-4803 West Chester Pike, Newtown Square, PA 19073
Sponsor #1 Anderson Elder Law		Sponsor #2 TBD	
May 16, 2023	Annual Meeting Social		Levante Brewing Tap Room 208 Carter Drive, Suite 2 West Chester, PA 19382
Sponsor #1 TBD Sponsor #3 TBD		Sponsor #2 TBD Sponsor #4 TBD	

Questions? Contact
Chester County Estate Planning Council
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CCEPC Board meets from 4:15-5:15 in:
 Sept, Oct, Feb & May