



Marin County Estate Planning Council

President's Message

To the members of the Marin County Estate Planning Council:

I am pleased to report to you that our membership now stands at 128, including seven members who have joined this year. Thank you to all of you who have been inviting guests and encouraging colleagues to join the Council.

We welcome new members Terry Aman, David Bell, Michael Freedman, Gage Houser, Laurie Nardone, Michael O'Neill and Kim Schwarz. Make a point of looking for them at the next meeting.

Do continue to invite guests who a) may be interested in joining the Council and who meet the membership criteria (see website); or b) have a particular interest in the meeting topic. **Members are expected to attend the meeting with their guests** and should be prepared to introduce them. Guests may attend Council meetings up to twice in any (fiscal) year. Remember: only members may invite guests, and guests may not invite other guests. The wine rewards program will continue indefinitely!

UPCOMING PROGRAMS

The March 10 program features Sean Stannard-Stockton of Tactical Philanthropy, who will talk to us about "Managing Philanthropy and Evaluating Charities: The Advisor's Role in Helping Clients Plan their Philanthropy." The meeting notice, with complete information, is attached.

The May program will be about the current estate tax situation – whatever it may be.

WEBSITE INFORMATION

You can always find information about meetings and membership on our website, as well as links to other Councils in the area and resources that you may find useful. The membership directory is online in the members-only section of the site. To access the members-only portion of the site, enter our **username: mcepc** and **password: service**.

NEWS AND OPPORTUNITIES FROM THE NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

The Marin County Estate planning Council is an affiliate council of the national Association of Estate Planning Councils. Therefore, all members of the MCEPC may take advantage of a variety of benefits, including the following:

Council Nominated AEP® Program: Our Council may recommend qualified members for the AEP® designation from each of the following disciplines: accountant, attorney, insurance and financial planning or trust officer. Council-nominated members must have a minimum of 15 years' experience in estate planning and estate planning activities and will be subject to current designation qualifications and requirements, except the requirements for professional references. The application fee for these candidates will be \$125, which is 50% of the usual fee.

If you would like the MCEPC Board to recommend you, you may download the application form by clicking here: [Accredited Estate Planner Application Forms](#) and submitting it to Doug Paul.

National Conference: The 47th Annual Conference is scheduled for **November 17-19, 2010** in San Diego, California, and all members are invited to attend. Details can be found at www.naepc.org.

National Membership Benefits: NAEPc offers us many benefits, programs and services, in categories such as software; educational programs; subscriptions; publications; marketing; and more. The full list is available at www.naepc.org. For access to the members-only portions of the website, enter our username: **marin** and our password: **epcmember**

AN INVITATION

Members of our Council are invited to attend the **San Francisco Financial Planners' Association's regional conference**, which will be held on June 2nd and 3rd. A conference flyer is attached, and more information may be found at www.FPANorCal.org.

I look forward to seeing all of you in March,

Aviva Shiff Boedecker