

LOS ANGELES ESTATE PLANNING COUNCIL

Don't miss out on a dynamic educational and networking group

The L.A. Estate Planning Council is a long-standing group of trust and estate professionals who meet once each month to hear the latest in estate planning changes and techniques, while earning continuing education credit for attorneys, CPAs, CFPs and CTFAs.

Our membership is comprised of Los Angeles area tax and trust attorneys, accountants, trust officers, investment professionals, and gift planners. The Council is designed to help you gain industry knowledge, network with other established professionals, and access a "sounding board" for daily substantive and administrative challenges.

The L.A. Estate Planning Council meets for lunch on the fourth Wednesday of each month. We convene at the City Club on Bunker Hill, located in the Wells Fargo Tower, 333 South Grand Avenue, 54th Floor, Los Angeles. Our 2011-2012 season runs from September through June; the combined May/June meeting is a social dinner.

Don't miss this opportunity to meet your continuing education credit requirements and develop new networking relationships.

Browse our website www.laepc.org for additional information about the group and to learn more about our current members.

Attached for your consideration is the LAEPC Membership Form with all of the pertinent information to become a member. If you have questions, please don't hesitate to contact:

President	David Burns	(626) 463-2516
Vice President	Aimee Kwain	(310) 295-3727
Past President and Treasurer	Sue Boling	(626) 585-4333
Sponsorship	David Rosenthal	(310) 215-0482
Co-Speaker Chair	Ryan Martinez	(310) 286-6038
Co-Speaker Chair	David Shapiro	(310) 773-0377
Secretary	Jim Thiel	(424) 253-7400
Membership	Mike Wegge	(213) 243-7168

WE LOOK FORWARD TO YOUR PARTICIPATION!



Los Angeles Estate Planning Council

Welcome to a new year with the Los Angeles Estate Planning Council. Here are our meeting dates and times for the 2011-2012 year.

Our meetings will be held at the City Club on Bunker Hill in the Wells Fargo Tower, 333 S. Grand Avenue, Los Angeles, CA 90071

Meetings 2011-2012

September 28
Lunch, 11:45 a.m.

October 26
Lunch, 11:45 a.m.

November 16
Lunch, 11:45 a.m.

January 25
Lunch, 11:45 a.m.

February 22
Lunch, 11:45 a.m.

March 28
Lunch, 11:45 a.m.

April 25
Lunch, 11:45 a.m.

May/June TBD
Dinner, 5:45 p.m.

July / Aug / Dec
DARK

New Officers

President	David Burns	(626) 463-2516
Vice President	Aimee Kwain	(310) 295-3727
Co-Speaker Chair	Ryan Martinez	(310) 286-6038
Co-Speaker Chair	David Shapiro	(310) 773-0377
Sponsorship	David Rosenthal	(310) 215-0482
Secretary	Jim Thiel	(424) 253-7400
Membership	Mike Wegge	(213) 243-7168
Past President/Treasurer	Sue Boling	(626) 585-4333

Sponsorship

If you are interested in advertising on our website, www.laepc.org, and/or becoming a sponsor for parking, the June social dinner, wine, etc. please contact David Rosenthal.

This is a great way to have your business known to the group of professionals who attend our meetings and browse our website.

Annual Dues

Membership Dues for the year are \$350. There is a \$60 per meeting fee for non-members and guests. In addition, valet parking at the Wells Fargo tower is \$10 per meeting.

Make your check payable to the Los Angeles Estate Planning Council and send it as soon as possible to--

Sue Boling, VP & Sr. Trust Officer
Wells Fargo Bank
350 W. Colorado Blvd., #390
Pasadena, CA 91105

LOS ANGELES ESTATE PLANNING COUNCIL

PRESIDENT: DAVID BURNS
PAST PRESIDENT: SUE BOLING
PROGRAM CHAIR: RYAN MARTINEZ
SECRETARY: JIM THIELE

2011-2012 EXECUTIVE BOARD

VICE PRESIDENT: AIMEE KWAIN
SPONSORSHIP: DAVID ROSENTHAL
PROGRAM CHAIR: DAVID SHAPIRO
MEMBERSHIP: MICHAEL WEGGE

2011 - 2012 Membership Invoice (Please include this form with your check)

NAME: _____
Please Print
TITLE: _____
DESIGNATIONS: _____
COMPANY: _____
ADDRESS: _____

PHONE NO.: _____
CELL: _____
FAX: _____
E-MAIL: _____

COMPANY WEBSITE: _____

Upcoming Meetings

09/28/10 11:45 Lunch @ City Club

10/26/10 11:45 Lunch @ City Club

11/16/10 11:45 Lunch @ City Club

December: Dark

01/25/11 11:45 Lunch @ City Club

02/22/11 11:45 Lunch @ City Club

03/28/11 11:45 Lunch @ City Club

04/25/11 11:45 Lunch @ City Club

May/June 5:45 Dinner; location TBD

July & August: Dark

Professional changes since 2010 – 2011

Recent promotion: _____

Recent job move: _____

Recent success you would like to share (explain): _____

MEMBERSHIP FEE: \$350 for checks postmarked by 12/31/2011

GUEST/NON-MEMBER FEE: \$60/MEETING (No complimentary guests or substitutions)

VALET PARKING FEE: \$10/ MEETING

KINDLY REMIT YOUR CHECK PAYABLE TO:

“L.A. ESTATE PLANNING COUNCIL”
C/O SUE BOLING, VP & SR TRUST OFFCR
WELLS FARGO BANK
350 W. COLORADO BLVD., SUITE 390
PASADENA, CA 91105-1855