

# Los Angeles Estate Planning Council Member Application Form 2016-2017

The Los Angeles Estate Planning Council is the premiere network of estate planning advisors, including attorneys, CPAs, trust officers, wealth managers, insurance agents and valuation professionals in Los Angeles. The LAEPC's mission is to enhance the proficiency of professional advisors who are active in estate planning. Each meeting features a highly regarded speaker on issues of importance to estate planning advisors. Members enjoy all privileges of monthly meetings, continuing education credit (if available), invitations to special events (including our annual social in May), networking opportunities, posting on the organization's website, inclusion in and receipt of a printed membership directory (see below), and the opportunity to serve as a director or officer.

## **MEETINGS:**

The Los Angeles Estate Planning Council meets for lunch on the fourth Wednesday of the month (except for September and October, which meets on the dates listed below) from 11:45am-1:30pm at the New City Club in downtown Los Angeles, located at the top floor of the City National Tower (555 South Flower Street, 51st Floor, Los Angeles, CA 90071). The dates of our 2016-2017 season are as follows:

- |                         |                            |
|-------------------------|----------------------------|
| 1. September 27, 2016   | 5. February 22, 2017       |
| 2. October 25, 2016     | 6. March 22, 2017          |
| 3. November 16, 2016    | 7. April 26, 2017          |
| We are dark in December | 8. Annual Social: Date TBD |
| 4. January 25, 2017     |                            |

## **DUES:**

Membership Dues for the 2016-2017 Season are \$425 by check or \$435 by PayPal. All members **MUST COMPLETE THE APPLICATION** below for the 2016-2017 Season. For members joining in January, dues for the remainder of the remainder of the Season are \$300. A per meeting fee for non-members and guests is \$75. Additionally, validated parking is \$8 in the City National Tower.

In addition to completing the form below, if remitting payment by check, please make your check payable to the Los Angeles Estate Planning Council and send it as soon as possible to:

Sue Boling  
Senior Trust & Fiduciary Officer  
Wells Fargo Private Bank  
350 W. Colorado Boulevard  
3rd Floor  
Pasadena, CA 91105-1855

**PRINTED MEMBER DIRECTORY:**

This year will be the second year our members will be included in and receive a printed member directory. In order to allow enough time for our members to remit payment for annual dues and for our officers to to compile and print the directory, the deadline for members to remit payment for the 2016-2017 Season and be included in the printed member directory is November 2, 2016. Payment for dues received after November 2, 2016 will entitle the member to all membership privileges except inclusion in the directory.

**SPONSORSHIP:**

If you are interested in advertising on our website (www.laepc.org), and/or becoming a sponsor for parking, the May annual dinner social, and other sponsorship opportunities, please contact Jim Thiele (jwt@westburyent.com).

**OFFICERS FOR 2016-2017:**

- 1. Past President: Michael Wegge (michael.wegge@tiaa-cref.org)
- 2. President: Jim Thiele (jwt@westburyent.com)
- 3. Vice President: Whit Prouty (whit@whitprouty.com)
- 4. Treasurer: Sue Boling (sboling@wellsfargo.com)
- 5. Programming Chair: Anne E. Gifford Ewing (agifford@gdalaw.com)
- 6. Programming Chair: Zachary Dresben (zsd@kramerlg.com)
- 7. Membership: Tiffany Tso (ttso@fastcpas.com)
- 8. Secretary: Michelle Nguyen (mnguyen@ff-inc.com)

**MANDATORY APPLICATION FOR 2016-2017 SEASON:**

First and Last Name\*: \_\_\_\_\_

Profession\*: \_\_\_\_\_

Title: \_\_\_\_\_

Business Name\*: \_\_\_\_\_

Business Address\*: \_\_\_\_\_  
\_\_\_\_\_

E-mail Address\*: \_\_\_\_\_

Phone Number\*: \_\_\_\_\_

Payment\*: \_\_\_ \$425 by Check, \_\_\_ \$435 by PayPal, or \_\_\_ \$300 for January Membership

\*Required Information

**Please send this completed form to Sue Boling at the address and/or e-mail address above**