

Los Angeles Estate Planning Council Member Application Form 2018-2019

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, and the opportunity to serve as a director or officer.

MEETINGS:

The Los Angeles Estate Planning Council meets for lunch 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 2018-2019 season are as follows:

- | | |
|----------------------------------|---------------------------------|
| 1. Wednesday, September 12, 2018 | 5. Wednesday, February 27, 2019 |
| 2. Wednesday, October 24, 2018 | 6. Wednesday, March 27, 2019 |
| 3. Tuesday, November 27, 2018 | 7. Wednesday, April 24, 2019 |
| We are dark in December | 8. Annual Social: May 2019 |
| 4. Wednesday, January 23, 2019 | |

DUES:

Membership Dues for the 2018-2019 Season are \$425 by check or \$435 by PayPal. All members **MUST COMPLETE THE APPLICATION** below for the 2018-2019 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:

Leonardo Bolanos
Private Banking Relationship Advisor
Northern Trust
201 South Lake Avenue
Suite 600
Pasadena, CA 91101

PayPal payments can be sent to: Los Angeles Estate Planning Council, aimee_kwain@yahoo.com.

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 Zachary Dresben (zsd@kramerlg.com).

OFFICERS FOR 2018-2019:

1. Past President: Whit Prouty (whit@whitprouty.com)
2. President: Anne Gifford Ewing (agifford@gdalaw.com)
3. Vice President: Zachary Dresben (zsd@kramerlg.com)
4. Treasurer: Leonardo Bolanos (lab16@ntrs.com)
5. Senior Programming Chair: Tiffany Tso (ttso@fastcpas.com)
6. Programming Chair: Michelle Nguyen (mnguyen@ff-inc.com)
7. Secretary: Tiffany Halimi (thalimi@clarktrev.com)
8. Membership Chair: Samuel Pugatch (samuel.pugatch@nfp.com)

MANDATORY APPLICATION FOR 2018-2019 SEASON:

First and Last Name*: _____

Profession*: _____

Title: _____

Business Name*: _____

Business Address*: _____

E-mail Address*: _____

Phone Number*: _____

Credit Card: _____ Exp: _____ CVV: _____

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

*Required Information

Please send this completed form to Leonardo Bolanos at the address and/or e-mail address above.