

Los Angeles Estate Planning Council

Member Application Form 2015-2016

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, October, and November, 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 2015-2016 season are as follows:

1. September 16, 2015
 2. October 21, 2015
 3. November 18, 2015
 4. January 27, 2015
 5. February 24, 2015
 6. March 23, 2015
 7. April 27, 2015
 8. Annual Social: May 25, 2015 (Tentative Date)
- We are dark in December

DUES:

Membership Dues for the 2015-2016 Season are \$425 by check or \$435 by PayPal. All members **MUST COMPLETE THE APPLICATION** below for the 2015-2016 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

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

PRINTED MEMBER DIRECTORY:

This year will be the FIRST 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 2015-2016 Season and be included in the printed member directory is November 2, 2015. Payment for dues received after November 2, 2015 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 2015-2016:

- 1. Past President: David Shapiro (david@davidshapirolaw.com)
- 2. President: Michael Wegge (michael.wegge@tiaa-cref.org)
- 3. Vice President: Jim Thiele (jwt@westburyent.com)
- 4. Treasurer: Sue Boling (sboling@wellsfargo.com)
- 5. Senior Programming Chair: Whit Prouty (whit@whitprouty.com)
- 6. Programming Chair: Anne E. Gifford Ewing (agifford@gdalaw.com)
- 7. Membership: Zachary Dresben (zdresben@gmail.com)
- 8. Secretary: Tiffany Tso (ttso@fastcpas.com)

MANDATORY APPLICATION FOR 2015-2016 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.