

## Los Angeles Estate Planning Council 2019-2020 Membership Application Form

The Board of the Los Angeles Estate Planning Council (LAEPC) is excited to present its 2019-2020 season at our new location, the California Club. LAEPC is the premier network of estate planning advisors including attorneys, CPAs, trust officers, wealth managers, insurance agents and valuation professionals in Los Angeles. LAEPC's mission is to enhance the proficiency of professional advisors who play an active role in estate planning and to build relationships in the estate planning community. Each luncheon features a highly regarded speaker on contemporary issues of importance to estate planning advisors. Members enjoy all privileges of monthly meetings, networking, continuing education credit (if available), and invitations to our annual social.

LAEPC's 2019-2020 season is sponsored by:



Kramer + Dresben



**Dues for the 2019-2020 season: \$475**

(All 6 lunches, Parking, Coffee Social, Membership Book, Website, and invitation to Annual Social)

**Guest fee per lunch: \$110**

Please submit the completed application below along with payment as follows:

### **Mandatory Membership Application Form**

Name:

Profession:

Title:

Business Name:

Business Address:

E-mail Address:

Phone Number:

### **Personal check or Square Credit Card**

**payment for \$475 made payable to:**

Los Angeles Estate Planning Council

c/ Leonard Bolanos

Northern Trust

201 South Lake Avenue, Suite 600

Pasadena, CA 91101

LAB16@ntrs.com

### **Square Credit Card info required:**

Credit Card No.:

Exp: CCV:

Zip Code on Card:

**LAEPC meets at the California Club**

(538 S. Flower Street, Los Angeles, CA 90071)

in the Fireside Room from 11:45am-1:30pm.

Please come early for networking followed by lunch and presentation.

### **Meeting Dates:**

1. Wednesday, October 23rd
2. Wednesday, November 20th
3. Tuesday, January 28th + **\*Coffee Social**
4. Tuesday, February 25th
5. Tuesday, March 24th
6. Wednesday, April 22nd
7. **\*Annual Social**, May 14th, (location TBD)

**\*Members Only** (the inaugural post-luncheon Coffee Social & season concluding Annual Social are casual networking opportunities for members)

### **2019-2020 Board Officers**

Zachary S. Dresben, *President* [Kramer + Dresben]

Michelle Nguyen, *Vice President* [First Foundation]

Leo Bolanos, *Treasurer* [Northern Trust]

Tiffany Halimi, *Senior Programming Chair* [Clark & Trevithick]

Samuel Pugatch, *Programming Chair* [NFP]

Caitlin Cogan, *Secretary* [Cogan Fiduciary Services]

Megan Braun, *Membership Chair* [Law Offices of LeAnne E. Maillian]