

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 & insurance professionals, real estate experts 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 (except for November which meets on the 3rd Wednesday). We convene at the New City Club, located in the City National Tower, 555 South Flower Street, 51st Floor, Los Angeles. Our 2014-2015 season runs from September through May; the May 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 Shapiro	(310) 773-0377
Vice President	Mike Wegge	(310) 407-2806
Co-Speaker Chair	Jim Thiele	(818) 718-7400
Co-Speaker Chair	Whit Prouty	(310) 962-6942
Membership	Anne Gifford Ewing	(213) 626-4481
Secretary	Zachary Dresden	(323) 964-7100
Treasurer	Sue Boling	(626) 585-4333
Immediate Past President	Ryan Martinez	(310) 286-6038

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 2014-2015 year.

Our luncheons will be held at the new City Club Downtown in the City National Bank Tower, 51st Floor, 555 S. Flower Street, Los Angeles, CA 90071

Meetings 2013-2014

September 24
Lunch, 11:45 a.m.

October 23
Lunch, 11:45 a.m.

November 19
Lunch, 11:45 a.m.

December
Dark

January 28
Lunch, 11:45 a.m.

February 25
Lunch, 11:45 a.m.

March 25
Lunch, 11:45 a.m.

April 22
Lunch, 11:45 a.m.

May TBD
Dinner

New Officers

President	David Shapiro	(310) 773-0377
Vice President	Michael Wegge	(310) 407-2806
Co-Speaker Chair	Jim Thiele	(818) 718-7400
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Sponsorship

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

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 \$425 and for those joining in January or thereafter \$300. Initially, the meeting fee for non-members and guests will be \$75. In addition, validated parking at the new City Club is expected to be \$8 per meeting.

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

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

LOS ANGELES ESTATE PLANNING COUNCIL

2014 - 2015

Membership Invoice

(please include this form with your check)

NAME: _____
TITLE: _____
COMPANY: _____
ADDRESS: _____

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

Upcoming Meetings

9/24/14 - 11:45 Lunch @ City Club

10/22/14 - 11:45 Lunch @ City Club

11/19/14 - 11:45 Lunch @ City Club

December: Dark

1/28/15 - 11:45 Lunch @ City Club

2/25/15 - 11:45 Lunch @ City Club

3/25/15 - 11:45 Lunch @ City Club

4/22/15 - 11:45 Lunch @ City Club

May Dinner/Social - TBD

Professional changes since 2013

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

MEMBERSHIP FEE: \$ 425 pay by check

\$ 435 pay by PayPal or credit card

GUEST FEE: \$75 / MEETING (Refunded upon their becoming a paid member)
(No complimentary guests or substitutions)

If paying by check, please remit your check payable to:

"L.A. ESTATE PLANNING COUNCIL"
C/O SUE BOLING, VP & SR TRUST OFFICER
WELLS FARGO BANK
350 W. COLORADO BLVD., 3rd Floor
PASADENA, CA 91105-1855