

The Suncoast Estate Planning Council (SEPC) is a proud member of the National Association of Estate Planners and Councils (NAEPC). SEPC is dedicated to providing its professional members with outstanding educational programs. The members of the local Council, since its inception in 1990, have provided invaluable information to individuals and families as they are developing their estate plans. With their guidance, millions of dollars have been reallocated to benefit the families themselves as well as the many wonderful not-for-profit organizations throughout our community. SEPC is a legacy leader in the Tampa Bay Community.

**ROUNDTABLE MEETING
SCHEDULE 2011/2012**

October 6th Alan Gassman
How to Design, Explain & Implement Dynasty Trusts, Whether Domestic, Foreign or in Florida

November 3rd (Lunch) Jonathan Gopman
Planning with Offshore Asset Protection Trusts, Problems, Pitfalls, Opportunities & Assurance

December 1st (Lunch) Slade Dukes
Topic TBA - Joint Mtg with SPB Probate

January 19th Richard Gans, Esq.
When Good Beneficiary Designations Go Bad: What You Can & Can't Do to Fix Them

February 9th Stacy Eastland
TBA

March 8th Alan Mong
Discovering Your Memory Power

April 26th (Lunch) Shumaker Loop &
Panel Discussion Kendrick, LLP

**SUNCOAST ESTATE
PLANNING COUNCIL,**

- I spend a significant portion of my time in estate planning.
- I understand that if I cease to be qualified in one of the categories for membership listed, I must immediately notify the Secretary and my membership shall cease. In such case, I may be entitled to a refund of a portion of my dues for the year of qualification.
- I understand that the Suncoast Estate Planning Council, Inc. prohibits the use of a membership in any form of advertising or solicitation of business.

Signature: _____

**SUNCOAST ESTATE PLANNING
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—Membership—

Associate Member

Attorneys

Certified Financial Planners

Certified Public Accountants

Charitable Organization

Executives [501(c)(3)]

Chartered Life Underwriters

Trust

Company/Division/Department

Employees

Chartered Financial Consultants

Accredited Estate Planners

Emeritus (Retired)

*Member of the National Association of Estate
Planners and Councils*

SUNCOAST ESTATE PLANNING COUNCIL, INC.

The Suncoast Estate Planning Council was officially organized in 1990. The Council has successfully created an opportunity for local estate planners to network, socialize and continue their education on pertinent estate planning information. Membership today consists of approximately 110 professionals.

COUNCIL OBJECTIVES

1. To maintain the highest standard of ethics and service in providing informed guidance in the creation, conservation, and distribution of trusts and estates.
2. To promote and further the study of the technical and practical aspects of estate planning education to its members.
3. To promote cooperation among its members of the different disciplines which are part of the estate planning process.

MEETINGS

The membership gathers monthly for either a breakfast roundtable meeting or a lunch meeting. Meetings are typically held at All Children's Hospital Education and Conference Center (701 4th Street South, St. Petersburg), 8:00–9:00 a.m. Membership Socials are held twice a year. Meeting notices are sent prior to each meeting.

MEMBERSHIP DUES

Membership dues include all breakfast and lunch meetings plus the socials. Annual dues are \$195.00 (Associate Members are \$245) for a complete fiscal year (June–May). Members joining during the year are charged based on the following sliding scale:

Sept.–Nov. = \$195.00

Dec. –Feb. = \$125.00

Mar. –May = \$ 75.00

Membership dues should be made payable to the Suncoast Estate Planning Council.

TO JOIN

Applicants are required to obtain recommendations from two current members, one of whom shall be in the same profession or discipline as the applicant, only one sponsor can be from the applicants institution. Associate Members require three sponsors. A letter of recommendation from each sponsor (listed below) must be attached to this application when submitted.

RECOMMENDED BY: (ASSOCIATE MEMBERS REQUIRE THREE)

1. Print Name and Category:

2. Print Name and Category:

3. Print Name and Category:

MEMBERSHIP APPLICATION

Name

Title

Firm

Mailing Address

Business Phone

Fax

E-Mail

Would you like your information
listed on our website?

PROFESSIONAL CATEGORY

- Associate Member
- Attorney at Law
- Certified Financial Planner
- Certified Public Accountant
- Charitable Organization Executive
- Chartered Life Underwriter
- Trust Company/Division/
Department Employee
- Chartered Financial Consultant
- Accredited Estate Planner
- Emeritus (Retired)