Northwest Washington Estate Planning Council

MEMBER: NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

August 19, 2011

Hello NWEPC Members,

It's that time of the year again, and we'll soon resume our meetings at beautiful Chuckanut Manor. We are excited to offer another line-up of interesting speakers and excellent opportunities to network with fellow estate planning professionals. **The dues statement for the 2011-2012 year is attached**. Please fill out the statement and mail it with your dues payment to our Treasurer, Kevin DeYoung, by September 15, 2011.

All of our general membership meetings will again be held at Chuckanut Manor this year. Social hour will begin at 5:30 pm, with our dinner meeting and program beginning promptly at 6:00 pm.

Our Vice President, Mark Logan, has done a great job in putting together our program for the year:

- Sep 21, 2011 - ***"Current Happenings in the Valuation World,"*** presented by Jennifer P. Todd, CFA, ASA (Sr Mgr, Advisory Services, Grant Thornton LLP, Seattle, WA). Jennifer specializes in the valuation of closely held businesses operating in a variety of industries, for purposes of litigation support, acquisitions, sales, buy-sell agreements, ESP's, estate planning and taxation.

- Nov 16, 2011 - ***"Dividend Portfolio Construction for Trusts,"*** presented by Robert Johanson, CFP, CIMA, CIMC (Director, Sr Investment Specialist, ClearBridge Advisors, Seattle, WA). Bob has over 17 years of investment industry experience.

- Jan 18, 2012 - ***"Behavioral Economics and Investor Decisions,"*** presented by Gregory Tevis, JD, CFP (Sr Corporate Counsel, AIG Advisor Group, Phoenix, AZ). Greg has been associated with the financial services industry for many years, as an enforcement attorney for the SEC, an attorney in private practice, and as in-house counsel (for 23 years) to the CEO of a division of three first tier NYSE firms.

- Mar 21, 2012 - ***"Long Term Care Planning,"*** presented by Kevin Forman, CLTC (Regional Marketing Director, Lincoln Financial Distributors, Inc, Seattle, WA). Kevin comes from a family that helped pioneer one of the first LTC policies in the nation in 1972. He has been a recognized leader in the LTC industry for many years.

- May 16, 2012 - ***"Working with a Funeral Director,"*** presented by John W. Moles, Funeral Director (Owner & President, Moles Funeral Homes & Crematory, Bellingham, WA). John is the fourth generation in the family funeral service business.

If you have any questions, please see our website at www.nwepc.org or contact a member of the board.

We look forward to seeing you over the coming year and thank you for your continued support of our council.

Sincerely,

Stephanie Hathaway

Stephanie Hathaway, President
Northwest Washington Estate Planning Council

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2011-2012 ANNUAL MEMBERSHIP DUES STATEMENT

Your Name (as you would like it listed on our website):______________________________

Business Name :______________________________ Phone:______________________________

Address:______________________________ Fax: ______________________________

______________________________ Email: ______________________________

Is any of this information changed from last year? Yes ____ No ____ Website:______________________________

Check all that apply:

☐ **Accountant**	☐ **Certified in Long Term Care (CLTC)**	☐ **Insurance Agent**
☐ **Accredited Estate Planner (AEP)**	☐ **Chartered Life Underwriter (CLU)**	☐ **Investment Advisor**
☐ **Accredited Investment Fiduciary (AIF)**	☐ **Certified Public Accountant (CPA)**	☐ **Life Underwriter Training Council Fellow (LUTCF)**
☐ **Attorney**	☐ **Certified Trust & Financial Advisor (CTFA)**	☐ **Trust Officer**
☐ **Certified Financial Planner (CFP)**	☐ **Executive Director of Qualified Charity**	☐ **Registered Health Underwriter (RHU)**
☐ **Chartered Financial Consultant (ChFC)**	☐ **Financial Planner**	☐ **Other - Associate Member**

I. ANNUAL DUES - Includes five dinner meetings and a basic website listing **$250.00**

II. OPTIONAL UPGRADE - Add your website link to the NWEPC Member Directory listing $25.00 $________

III. SPONSORSHIP OPPORTUNITIES

Platinum $1,000.00 **SOLD**

- Website link and banner at top center of the NWEPC webpage
- Sponsorship of one meeting during the year

Gold $750.00 **SOLD**

- Website link and banner on the side of the NWEPC Home page
- Sponsorship of one meeting during the year

Silver $500.00 **SOLD**

- Website link and banner on the NWEPC Patron page
- Sponsorship of one meeting during the year **OR** sponsorship of continuing education for the year

Patron $200.00 $________

- Website link and banner on the NWEPC Patron page

Total Payable: **$________**

Please mail payment by Sep. 15, 2011 to: NW Washington Estate Planning Council
P.O. Box 2488
Bellingham, WA 98227