

# The Northwest Washington Estate Planning Council

MEMBER: NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

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September 10, 2010

Hello NWEPC Members,

It's that time of the year again, and we're resuming our meetings at Chuckanut Manor. We are excited to offer another great line-up of speakers and opportunities to network with fellow estate planning professionals. Enclosed you will find your dues statement for the 2010-2011 year. Please return it promptly with your payment, or bring it with you to the September 15<sup>th</sup> meeting.

All of our general membership meetings will be held at Chuckanut Manor. Social hour will begin at 5:30pm and the meeting will begin promptly at 6:00pm.

Our Vice President, Stephanie Hathaway, has worked diligently to put together the follow program for the year:

September 15, 2010 - John E. Poffenbarger, Attorney, Karr Tuttle Campbell, Seattle, WA

John is a recognized expert in advanced estate planning strategies, business planning for closely-held entities, business succession planning, shareholder agreements, and business sales and acquisitions. John will speak on: "2010 Estate Tax Repeal: Recent Developments"

November 10, 2010 - Jeanne K Smith, Prof. Estate Organizer, Exit Stage Right, Palo Alto, CA

Jeanne pioneered the field of estate organization and is a nationally recognized expert in helping families to get their affairs in order. Her presentation is entitled: "You Can't Take It With You."

January 19, 2011 - Mary Gregg Byrne, puppy raiser, Guide Dogs for the Blind, Bellingham, WA

Mary's topic is: "Everything You Ever Wanted to Know About Guide Dogs for the Blind."

March 16, 2011 - John Frazier, VP/Acc. Exec, Life Insurance, Parker Smith & Feek Inc, Bellevue, WA

John has over 20 years of experience in life insurance. He specializes in business and estate planning, key-person life insurance, buy-sell funding, non-qualified deferred compensation plans and business continuity plans. John will speak on "Primary Uses of Deferred Compensation"

May 18, 2011 - Eric A Smith, CFP, AIF, Goodfunds Wealth Management, Seattle, WA

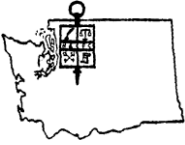
For 25 years, Eric has been assisting investors with socially responsible and sustainable investment strategies. His presentation is entitled: "Putting the *Why* Back in Money: Purpose and Values-Based Investing for Family Trusts and Foundations"

If you have any questions, please see our website at [www.nwepc.org](http://www.nwepc.org) or contact a member of the board.

We look forward to seeing you throughout the year and thank you for your continued support of the Northwest Washington Estate Planning Council.

Sincerely,

Scott A Hume, President  
Northwest Washington Estate Planning Council



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MEMBER NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

## 2010-2011 ANNUAL MEMBERSHIP DUES STATEMENT

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Fax: \_\_\_\_\_

\_\_\_\_\_

Email: \_\_\_\_\_

Is this a new address or phone number? Yes \_\_\_ No \_\_\_

Website: \_\_\_\_\_

### Check all that apply:

- |                                   |                               |  |
|-----------------------------------|-------------------------------|--|
| <input type="checkbox"/> Attorney | <input type="checkbox"/> CLU  | <input type="checkbox"/> Accredited Estate Planner               |
| <input type="checkbox"/> CFP      | <input type="checkbox"/> CTFA | <input type="checkbox"/> Executive Director of Qualified Charity |
| <input type="checkbox"/> CPA      | <input type="checkbox"/> CLTC | <input type="checkbox"/> Associate Member                        |
| <input type="checkbox"/> ChFC     | <input type="checkbox"/> RHU  |  |

### I. ANNUAL DUES

Includes five dinner meetings and a basic listing on the website **\$250.00**

### II. OPTIONAL UPGRADES

Add your website to your NWEPC Directory listing \$25.00 \$\_\_\_\_\_

### III. SPONSORSHIPS

**Platinum** \$1,000.00 *SOLD*

- Banner across top of web site home page
- Website link
- Listing on the Patron page of the website
- Sponsorship of one meeting during the year

**Gold** \$750.00 *SOLD*

- Banner on the side of the web page
- Website link
- Listing on the Patron page
- Sponsorship of one meeting during the year

**Silver** \$500.00 \$\_\_\_\_\_

- Website link *Two available*
- Listing on the Patron page
- Sponsorship of one meeting during the year

**Patron** \$200.00 \$\_\_\_\_\_

- Website link *Unlimited*

**Total Due** \$\_\_\_\_\_

**FULL PAYMENT MUST BE RECEIVED BY SEPTEMBER 15, 2010**

Northwest Washington Estate Planning Council  
P.O. Box 2488  
Bellingham, WA 98227