Welcome to the 2024/2025 Delaware County Estate Planning Council year.

We will be meeting at The Towne House in Media for cocktails, a buffet dinner and our informative programs. Our first meeting will be on Tuesday, September 10, 2024.

Membership is now open for first time and renewing members either through the mail-in form below or the website Membership section @ www.dcepc.org/membership.

Council members will have the opportunity to avail themselves of the NAEPC benefits and educational programs as well as the opportunity to earn the AEP designation through the National Association of

Estate Planners & Councils.

Our event calendar is set, and we have a great line-up for our 2024/2025 Speaker Series:

1. September 10, 2024- Qualified Small Business Stock Planning; Joseph M. Armstrong, Esq., Offit Kurman
2. October 8, 2024- Philanthropy: How We Can Help Clients Make a Difference; Cynthia Pritchard, Wells Fargo Bank, N.A.
3. November 12, 2024- Optimizing Insurance Strategies in a Changing Landscape; Michael DiFilippo, CLU, ChFC , 1847 Private Client Group
4. December 10, 2024- HOLIDAY EVENT (details to be announced)
5. January 14, 2025- Finding A Fiduciary with Limited Choices; Kate Crary, Esq., Gadsden, Schneider & Woodward
6. February 11, 2025- Updates from the Orphans’ Court; The Honorable Kathrynann Durham & Vincent Rongione, Register of Wills
7. March 11, 2025- A.I. and Ethics in the Financial Services; Azish Filabi, J.D., MA – The American College
8. April 2025 – Joint post tax social event with CHESCO EPC (details to be announced)

Notices will be sent about 3 weeks before each meeting for reservations to be made. For additional information, check the Council website above or call Donna Willis at 610-565-3800 x 5.

PLEASE COMPLETE THE MEMBERSHIP FORM ONLINE OR COMPLETE THE FORM BELOW, AND RETURN IT WITH YOUR ANNUAL DUES CHECK PAYABLE TO "DCEPC" TO: DCEPC, PO BOX 2083, MEDIA, PA 19063

ANNUAL MEMBERSHIP FEE-$ 85.00 for the Council year June 1, 2024 through May 31, 2025.

CLE CREDIT FOR ATTORNEYS AND CPA CREDITS ARE AVAILABLE

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2024/2025 DCEPC MEMBERSHIP APPLICATION

NAME\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_NEW MEMBER\_\_\_\_\_\_FIRM\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TITLE: CPA CLU CFP ChFC ESQ TRUST OFFICER OTHER\_\_\_\_\_\_\_ (Circle one)

DISCIPLINE(S)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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WEBSITE\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_