

THE ESTATE PLANNING COUNCIL OF HAMPDEN COUNTY, INC.

LUNCHEON MEETING

Date: Tuesday, February 12, 2019
Time: 11:45 a.m. to 1:00 p.m.
Place: Basketball Hall of Fame, Springfield, MA
Speaker: Jeremiah W. Doyle, IV, *BNY Mellon Wealth Management*
Topic: Highlights from Heckerling

Jere Doyle, attended the 53rd Annual Heckerling Institute on Estate Planning conference. It is the preeminent conference for estate planners, including attorneys, accountants, insurance advisors, fiduciary officers and wealth management professionals. Jere will share his insights on the topics discussed at this year's conference, and will also report on the highlights of Heckerling pertinent to the 2017 Tax Act and the current implications on increased exemptions, impact on estate planning, new rules for donors and charities, as well as additional topics covered at this year's conference.

About the Speaker

Jeremiah W. Doyle, IV (Jere) is a senior Vice President at BNY Mellon Wealth Management. Jere is an estate planning strategist. He has been with the firm since 1981. Jere provides wealthy individuals and families throughout the country with integrated wealth management advice on how to hold, manage, and transfer their wealth in a tax efficient manner.

Please mark your calendars, and if a corporate check is needed, be sure to request it early, as it must arrive before the published due date for each meeting. Corporate checks should indicate the member's name.

Cost for this meeting: Paid Members \$35.00 Nonmembers \$40.00

RESERVATIONS AND PAYMENT FOR THE LUNCHEON MUST BE RECEIVED BY FRIDAY, February 1, WITHOUT EXCEPTION. CANCELLATIONS BY 10 a.m. January 4.

(Even if you are prepaid, you must let us know if you are coming or not coming. Space will not be reserved for non-respondents.)

NO PAYMENTS AT THE DOOR.

Name badges will be distributed at this meeting to paid members. Please return them when you leave.

Regular Meeting Dates for the 2018-2019 Fiscal Year:

Meetings will be held the second Tuesday of November, January, February, March and May.

Please reserve by e-mail to estateplan_hc@dejazzd.com, then send reservation form with payment to the address below. *Please do not staple your checks, as they may be rejected by the processing equipment.*

OR

[Click here to Pay by credit card.](#) Payment by credit card does not constitute a reservation. If

paying by credit card, please click on Reply and fill in the form below when you have completed your transaction online.

**The Estate Planning Council of Hampden County, Inc.
c/o Joan Peterson
A Way With Words
12845 Old Turnpike Road
Mifflinburg, PA 17844-8009
Cell Phone: 413.563.7057**

Note: If you are reserving late, please use e-mail or phone so we can arrange adequate seating.

Name _____

Company/Firm _____

Yes, I will attend on **February 12.** ____ No, I can't attend. ____
\$35 enclosed. ____ I have prepaid for all meetings (6 for 5 offer). ____
\$40 enclosed. ____ I am a nonmember or guest.
____ I have paid by credit card.

I will bring ____ guest(s). \$ ____ enclosed

Please list the name(s) of your guest(s) below:

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Membership Application or Change of Address: <http://www.estateplan-hc.org/application.htm>

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