

Subject: The Estate Planning Council of Hampden County, Inc. February 11, 2020 Luncheon Meeting
From: "Joan Peterson, Administrator" <estateplan_hc@dejazzd.com>
Date: 1/24/2020, 2:20 PM

THE ESTATE PLANNING COUNCIL OF HAMPDEN COUNTY, INC.

LUNCHEON MEETING

Date: Tuesday, February 11, 2020
Time: 11:45 a.m. to 1:00 p.m.
Place: Max's Tavern at the Basketball Hall of Fame
Topic: Giving Back: How Advisors Can Support Charitable Planning for Small and Family Owned Businesses

Hosted by the Community Foundation of Western Massachusetts, the Estate Planning Council of Hampden County, and Western New England University, attendees will learn from a panel of local advisors on how they have helped their clients leverage charitable planning and tools before, during, and after the sale of a business.

Attendees can expect to:

1. Learn how you can broach the topic of charitable giving with your clients and hear specific local examples of how other advisors have helped their clients realize their charitable goals during owning or exiting a business.
2. Learn about the tools available to help your clients realize their charitable goals and the tax benefits.
3. Learn how these conversations can strengthen your client relationship over the long-term and enable advisors to build relationships with the next generation of owners.

Moderator:

Katie Allan Zobel, President/CEO of the Community Foundation of Western Massachusetts

Panelists:

Dana Barrows, CLU®, ChFC®, J.D., Estate and Business Planning Specialist, Northwestern Mutual

Seunghee Cha, JD, Partner, Buckley Richardson Gelinas

Hyman Darling, J.D., Shareholder, Bacon/Wilson; Adjunct, Western New England University School of Law

Amy Jamrog, CFP®, CAP®, ChFC®, CLU®, CASL, Chief Executive Officer, The Jamrog Group

Julie M. Quink, CPA, Managing Principal, Burkhart Pizzanelli

Please note that during this presentation, the Community Foundation will be awarding our Distinguished Advisor in Philanthropy Award. This annual award recognizes a professional advisor who makes philanthropic planning with their clients an important part of their practice, helping to grow and transform our region by encouraging generosity.

Past awardees include: Past awardees include: Dennis Bidwell, Principal, Bidwell Advisors; Hyman Darling, Bacon/Wilson ; John Ferriter, Attorney, Ferriter Law; Richard M. Gaberman, Attorney, Robinson Donovan; Kate Kane, Wealth Management Advisor, Northwestern Mutual; George C. Keady III, Senior Vice President,

Wealth Management and Senior Portfolio Manager, UBS Financial Services; and Steven J. Schwartz, Founding Attorney, Shatz, Schwartz, and Fentin, P.C.

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

Remaining regular Meeting Dates for the 2019-2020 Fiscal Year:

Meetings will be held the second Tuesday of March and May.

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 \$40.00 Nonmembers \$45.00

RESERVATIONS AND PAYMENT FOR THE LUNCHEON MUST BE RECEIVED BY TUESDAY, February 4, WITHOUT EXCEPTION. CANCELLATIONS BY 10 a.m. February 7.

(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.

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 11.** ____ No, I can't attend. ____

\$40 enclosed. ____ I have prepaid for all meetings (6 for 5 offer). ____

\$45 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>

NAEPC Web site: <http://www.naepc.org>

Online Payments: http://www.estateplan-hc.org/member_payment.htm