

# THE ESTATE PLANNING COUNCIL OF HAMPDEN COUNTY, INC.

## LUNCHEON MEETING

**Date:** Tuesday, March 10, 2020  
**Time:** 11:45 a.m. to 1:00 p.m.  
**Place:** Max's Tavern at the Basketball Hall of Fame  
**Speaker:** *Jere Doyle, Senior Vice President, BNY Mellon*  
**Topic:** Heckerling Update 2020

### ABOUT THE SPEAKER:

Jere Doyle is an estate planning strategist for BNY Mellon Wealth Management and a senior vice president of BNY Mellon. 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.

Jere is admitted to practice law in the Commonwealth of Massachusetts and before the United States District Court, United States Court of Appeals (First Circuit) and the United States Tax Court. He formerly served as a member of the Massachusetts Joint Bar Committee on Judicial Appointments. He is the editor and co-author of Preparing Fiduciary Income Tax Returns, a contributing author of Preparing Estate Tax Returns, a contributing author of Understanding and Using Trusts and a contributing author of Drafting Irrevocable Trusts in Massachusetts, all published by Massachusetts Continuing Legal Education. Jere is also a reviewing editor of the 1041 Deskbook published by Practitioner's Publishing Company. Jere is a lecturer in law in the Graduate Tax Program at Boston University School of Law.

Jere received a LL.M. in banking law from Boston University Law School, a LL.M in taxation from Boston University Law School, a juris doctor from Hamline University Law School and a bachelor's degree from Providence College. He is a member of the American Bar Association, Massachusetts Bar Association, Boston Estate Planning Council and the Essex County Bar Association. He served as president of the Boston Estate Planning Council and currently serves as a member of its Executive Committee and was a 20-year member of the Executive Committee of the Essex County Bar Association. He was named as the 2009 Estate Planner of the Year by the Boston Estate Planning Council. Jere has spoken at numerous professional education programs throughout the country on various topics, been quoted in numerous business publications and has appeared on CNBC, MSNBC and CNN.

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

**Remaining regular Meeting Date for the 2018-2019 Fiscal Year:**

**May 12, 2020**

***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 : Paid Members \$40.00 Nonmembers \$45.00\***

**Note:** Guests attending more than twice per year are expected to apply for membership.

**\*If your dues are not paid, you are a nonmember.**

**RESERVATIONS AND PAYMENT FOR THE LUNCHEON MUST BE RECEIVED BY FRIDAY, March 3, 10 a.m., WITHOUT EXCEPTION. Cancellations by March 6.**

**(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](mailto: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  
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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 **March 10.** \_\_\_\_\_ 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:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Visit our Web Site: <http://www.estateplan-hc.org>  
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