

THE ESTATE PLANNING COUNCIL OF HAMPDEN COUNTY, INC.

LUNCHEON MEETING

Date: Tuesday, November 12, 2019
Time: 11:45 a.m. to 1:00 p.m.
Place: Max's Tavern at the Basketball Hall of Fame
Speaker: Thomas C. Rogerson, GenLeg CO.
Topic: Generational Legacy Planning

About the Speaker

Prior to starting his private practice, Tom was with Wilmington Trust, bringing his wealth management expertise as both a speaker and motivator to not only families but to Wilmington's client-facing teams. He helped Wilmington integrate Family Governance into the fabric of the client relationship, from introduction to full implementation. He created unique messaging utilizing both the Challenger Sale and the SPIN model to motivate prospects, centers of influence, clients, and internal teams towards his integrated approach in managing family wealth.

Previously, Tom was Managing Director of Family Wealth Services for BNY Mellon, National Director of Estate Tax Planning with State Street Global Advisors in Boston, and Director of Financial and Estate Tax Planning with Coopers and Lybrand. He holds a bachelor's in Economics from Ithaca College.

As a recognized leader and pioneer in family governance throughout the world, Tom uses his "6 Steps to Healthy Family Governance" to assist families with communication, philanthropic vision, legacy planning, succession, and education. Tom incorporates these critical issues into a client's comprehensive wealth management plan, not only helping to prepare the money for the family, but to also prepare the family for the money.

He brings more than three decades of experience to the wealth management industry where he has provided guidance and education to families, helping them transition significant capital, both tangible and intangible, from one generation to the next.

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 January, February, March and May.

Also, a special social holiday gathering will be held on December 12, which is not part of the regular meeting schedule. See Calendar on the EPC Web Site for more information.

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

The six for five offer applies to the six regular luncheon meetings only.

RESERVATIONS AND PAYMENT FOR THE LUNCHEON MUST BE RECEIVED BY TUESDAY, November 5, WITHOUT EXCEPTION. CANCELLATIONS BY 10 a.m. November 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 **November 12**. ____ 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>

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

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