

# THE ESTATE PLANNING COUNCIL OF HAMPDEN COUNTY, INC.

## LUNCHEON MEETING

Date: **Tuesday, November 14, 2017**  
Time: **11:45 a.m. to 1:00 p.m.**  
Place: **Colony Club**  
Speakers: **Daniel A. Sotera, USTrust**  
Topic: **Post Mortem Tax Planning**

### **About the Speakers:**

Daniel A. Sotera joins us with 30 years' experience in the areas of estate, fiduciary income tax and the Generation Skipping Tax. Dan is a Regional Tax Manager with USTrust, managing their estate tax team servicing the Northeast Region. Dan has been managing this team since 1996. Prior to his tenure with USTrust Dan earned his CPA designation working with KPMG LLP as a Senior Tax Manager managing the firm's Estate Tax Team.

Dan's presentation will address various post mortem tax planning opportunities, addressing the means to avoid pitfalls while maximizing tax savings opportunities. He will also address the various changes to the northeast states estate tax laws in recent years.

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

Remaining regular Meeting Dates for the 2017-2018 Fiscal Year:

January	9, 2018
February	13, 2018
March	13, 2018
May	8, 2018

**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.

Menu: COLONY CLUB BUFFET --- Cost : Paid Members \$30.00 Nonmembers \$35.00\*

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 TUESDAY, November 7, WITHOUT EXCEPTION. CANCELLATIONS BY 10 a.m. November 9.**

**(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**

**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 14.** \_\_\_\_ No, I can't attend. \_\_\_\_  
\$30 enclosed. \_\_\_\_ I have prepaid for all meetings (6-meetings offer). \_\_\_\_  
\$35 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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