

Estate & Financial Planning Council of Southern New Jersey



Member of the National Association of Estate Planners and Councils

MAY 4, 2017 BREAKFAST MEETING “ABLE ACT ACCOUNTS AND SPECIAL NEEDS TRUSTS”

Date:

Thursday, May 4, 2017

Location:

Laurel Creek Country Club
701 Centerton Rd., Mt. Laurel, NJ

Speaker:

Jane Fearn-Zimmer, Esq.—Rothkoff Law Group

Time:

8:00 am— Breakfast
8:30-9:30 am—Educational Program

This meeting is sponsored by:



For additional information please see Page : 5

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LETTER FROM THE PRESIDENT

Dear Council Members:



I was sorry to have missed seeing all of you and our esteemed speakers, Patrick McCormick, Esquire, and Kristin Schmid, Esquire, at our last educational event in February. I understand that it was a very informative presentation, and well received by our members. We sincerely appreciate the efforts of Patrick and Kristin in presenting to our Council.

I also must thank Harry Srolovitz and Praxis Data Systems for being an Exclusive Sponsor for our February event. Fendrick & Morgan is a proud Praxis client, and we appreciate their support of our Council.

One more, shameless, plug for membership: Anyone who becomes a member between now and the Installation Dinner will receive the benefits of membership for the balance of this year *and* will receive **next year's membership free**. So, if you know of anyone who may be on the fence about committing, please encourage them to join us. We all have colleagues and friends who would benefit from membership. I encourage you to also consider bringing a guest to our next breakfast event in May. There is no better way to highlight for your colleagues all we have to offer than by bringing them to one of our events.

Speaking of events, I look forward to introducing Jane Fearn-Zimmer, Esquire, of the Rothkoff Law Group, to present to us on the ABLE Act and Special Needs Trusts at our next breakfast meeting. That will be held **on May 4, 2017 at the Laurel Creek Country Club**. Breakfast will begin at 8:00 a.m., and our programming will get underway promptly at 8:30 a.m. We will wrap up at 9:30 a.m. ABLE is the acronym for "Achieving a Better Life Experience." (Who wouldn't want that??) This relatively new legislation allows qualifying disabled individuals to set up tax-exempt accounts (similar to Section 529 accounts) to pay for long-term care needs without jeopardizing their ability to qualify for, and receive, critical federal entitlement programs, such as Medicaid. This is a hot topic, and this presentation should not be missed. I look forward to seeing you all there.

Lastly, please mark your calendars **for Tuesday, June 1st**, to join us for our Installation Dinner at **Season's 52 at the Cherry Hill Mall**. Join me in celebrating another great year and the installation of a wonderful and dedicated Council Board Member, Mark Penny, as our next President.

If you have any questions about sponsorship opportunities, membership, the Newsletters or anything else, please always feel free to reach out.

See you all in May!

Sincerely,
Jamie Shuster Morgan, Esq.
Council President 2016-2017



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For more information contact Tim at EFPCSNJ@mail.com or 856-795-0551.

The AEP candidate form can be downloaded from the

2016-2017 MEETING SCHEDULE

Educational Meetings are usually approved for 1.0 CFP & CPE credits.
Meeting registration and more information can be found at www.EFPCSNJ.org

Thursday, September 29, 2016

Topic: Update on Uniform Trust Code
Speaker: Glenn Henkel, JD, LL.M., CPA - Kulzer & DiPadova, PA
Location: The Mansion on Main Street, Voorhees, NJ
Schedule: Breakfast 7:45 a.m.; Program 8:15-9:30a.m.
Sponsor: Garden State Trust Company

Thursday, November 17, 2016

Topic: New Regime Financial Update
Speakers: Anne Bucciarelli, CFA - Bernstein Wealth Management, Renee Vidal, J.D. LL. M. - Flaster Greenberg
Moderator: Kip Schaefer - Bernstein Wealth Management
Location: Laurel Creek Country Club, 701 Centerton Rd., Mt. Laurel, NJ
Schedule: Breakfast 8:00 a.m.; Program 8:30-9:30a.m.
Sponsors: Mass Mutual Financial Group, Praxis Data Systems, UBS Financial Services, Inc.

Thursday, January 19, 2017

Topic: Dilemmas of Dementia - Elder Care Event
Speakers: An exciting line up of presenters will be announced shortly
Location: Laurel Creek Country Club, 701 Centerton Rd., Mt. Laurel, NJ
Schedule: Breakfast 8:00 a.m.; Program 8:30-9:30a.m.
Sponsors: LifeSpan Care Management, Rothkoff Law Group, Virtua SeniorWise Care Management, Wells Fargo Private Bank

Thursday, February 16, 2017

Topic: International Tax Consequences Here and Abroad
Speakers: Patrick McCormick, JD & Kristin Schmid, JD—Kulzer & DiPadova
Location: The Mansion on Main Street, Voorhees, NJ
Schedule: Breakfast 8:00 a.m.; Program 8:30-9:30a.m.
Exclusive Sponsor: Praxis Data Systems

Thursday, May 4, 2017

Topic: Able Act Accounts and Special Needs Trusts
Speaker: Jane Fearn Zimmer - Rothkoff Law Group
Location: Laurel Creek Country Club, 701 Centerton Rd., Mt. Laurel, NJ
Schedule: Breakfast 8:00 a.m.; Program 8:30-9:30a.m.
Sponsor: Gelnmede, Wells Fargo Private Bank
There in only **One** Sponsorship Opportunity still available
Do not miss this opportunity to sponsor an EFPCSNJ Event - Call 856-795-0551 Today!

June 1, 2017

EFPCSNJ Installation and Awards Dinner
Location: Seasons 52, Cherry Hill Mall, Cherry Hill, NJ
Schedule: 6:00 pm - 9:00 pm
Sponsor: Bernstein Private Wealth Management, Wells Fargo
Sponsorship Opportunities are Still available
Do not miss this opportunity to sponsor an EFPCSNJ Event - Call 856-795-0551 Today!

INTERESTED IN SPONSORING AN EVENT?

If you are interested in sponsoring an EFPCSNJ meeting in the 2015–2016 Meeting Year, please contact Abby Murray at 856-795-0551.

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EFPCSNJ MAY 4, 2017 BREAKFAST MEETING “ABLE ACT ACCOUNTS AND SPECIAL NEEDS TRUSTS”

Date: Thursday, May 4, 2017

Time: Breakfast - 8:00 am, Educational Program - 8:30 am - 9:30 am

*****Location: Laurel Creek Country Club, 701 Centerton Rd., Mt. Laurel, NJ*****

Speaker: Jane Fearn Zimmer—Rothkoff Law Group

EFPCSNJ Members - \$30.00

Non-Members - \$40.00

Meeting Sponsors:



We are applying for this meeting to qualify for the following CE credits:
1.0 CPE credit (for CPAs), 1.0 CFP credits, NJ & PA CLE credits

Thank you to our CLE Sponsor:



May 4, 2017 EFPCSNJ Meeting Registration Form

NAME: _____ Member ___ Guest ___

COMPANY: _____

PHONE: _____ EMAIL: _____

NAME: _____ Member ___ Guest ___

COMPANY: _____

PHONE: _____ EMAIL: _____

Registration Fee: \$30/\$40 Enclosed is my check for \$_____ payable to:

EFPCSNJ • PO Box 460, Collingswood, NJ 08108 • Phone: 856-795-0551 • Fax: 856-210-1619 • efpcsnjmbrcvs@bowermanagementservices.com • www.efpcsnj.org

ONLINE REGISTRATION OPTION: Register online at the EFPCSNJ website (www.efpcsnj.org) and pay with a credit card. This option is fast, easy, secure and convenient

SAVE THE DATE FOR THE EFPCSNJ 2017 INSTALLATION AND AWARDS DINNER



Date: Thursday, June 1, 2017

Time: 6:00pm—9:00pm

Seasons 52, Cherry Hill NJ

EFPCSNJ Members & Non-Members - \$85.00

Come and celebrate the past year while we install the new officers of the EFPC of SNJ. You do not want to miss this opportunity to reconnect with old friends and make new friends over cocktails and dinner. Cocktails will be at 6:00 pm followed by the Installation and Awards Dinner at 7:00 pm.

Meeting Sponsors:



June 1, 2017 EFPCSNJ Installation Dinner Registration Form

NAME: _____ Member ___ Guest ___
COMPANY: _____

PHONE: _____ EMAIL: _____

NAME: _____ Member ___ Guest ___

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Registration Fee: \$85 Enclosed is my check for \$_____ payable to:

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Member-Get-a-Member Contest

EFPCSNJ is announcing a great opportunity to get involved in the organization and help all of the members and meeting attendees become more successful. As you know, one of the most important benefits of EFPCSNJ is networking with other professionals that work in the same industry as you do. By increasing membership we will increase the opportunity for networking and that will help everyone increase their professional circle. Increased membership and meeting attendance will help in the sharing of industry best practices as well as increase the potential for business referrals.

Please Help EFPCSNJ Grow!!! HERE IS HOW

EFPCSNJ will be running a contest now through April 30, 2017. Any current EFPCSNJ member that recruits a new member will receive complimentary attendance at a future educational event in the 2016-2017 program year. The EFPCSNJ member who recruits the most new members will receive 2 complimentary tickets to the Installation and Awards Dinner where they will receive an award.

The process is simple:

1. Discuss EFPCSNJ and the great benefits you receive from being a member with your professional colleagues that meet the membership criteria (Trust Officers, Chartered Life Underwriters, Attorneys, CPAs, CFPs, CFCs and other qualified professionals who are primarily involved in the financial planning process). Once they are ready to join they simply need to go to www.efpcsnj.org and select "Application Form" on the left hand menu.
 1. They will need to complete the form and make sure to put that they are recommended by you for membership at the bottom of the online form.
- Once the application is received it will be reviewed and the EFPCSNJ Office will get back to them regarding the status of their application.

Please help EFPCSNJ grow so we can continue to help all of our members prosper.

Some information about EFPCSNJ:

The Estate and Financial Planning Council of Southern New Jersey (EFPCSNJ) was established in 1975 and serves our members by providing educational and networking opportunities throughout the year. Our members are Trust Officers, Chartered Life Underwriters, Estate Attorneys, CPAs, CFPs, Chartered Financial Consultants and other qualified professionals who are involved in the estate and financial planning process. We have approximately 125 members that service clients in the NJ counties of Camden, Burlington, Atlantic, Cumberland, Ocean, Salem and Cape May. Being a part of this group provides you educational opportunities, networking events and the ability to get continuing education credits if you are a CFP, CPA or lawyer registered in NJ or PA.

EFPCSNJ holds 5 educational events per year and has an annual Installation and Awards Dinner. The educational events are held in September, November, January, March and May and the dinner is usually held in early June. For a complete listing of events please visit www.efpcsnj.org.

For more information on the Member-Get-a-Member Contest please call Abby Murray at 856-795-0551 or contact her by email at efpcsnjmbbrsvcs@bowermanagementservices.com.



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2016-2017 DUES RENEWAL

Description	Amount
Individual Member @ \$170	
Corporate Members – first 4 members @ \$170	
Corporate Members – 5th member and more @ \$120	
Total	
<p>\$170 for dues paid after 10/1/16</p> <p>Please make check payable to EFPCSNJ and mail to: PO Box 460, Collingswood, NJ 08108 <i>You can renew online and pay by credit card by going to the EFPCSNJ website (www.efpcsnj.org) and click "Member Renewal" on the left hand menu bar. You will need to log into the website as a member to renew your membership. Please call 856-795-0551 for assistance.</i></p> <p>Please make check payable to EFPCSNJ and mail to: PO Box 460, Collingswood, NJ 08108</p> <p><i>You can renew online and pay by credit card by going to the EFPCSNJ website (www.efpcsnj.org) and click "Member Renewal" on the left hand menu bar. You will need to log into the website as a member to renew your membership. Please call 856-795-0551 for assistance.</i></p>	

BENEFITS OF MEMBERSHIP

- Access to National web site and all its resources
- Quality speakers at the meetings
- Great networking opportunities
- Continuing education credits at every meeting
- Access to great resources through the membership directory

CONTACT INFORMATION

Member: _____

Nickname: _____

Discipline**: _____

Title: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

E-mail: _____

Website: _____

**Discipline:		
Attorney	Accounting	Financial Planning
Insurances	Reverse Mortgage Consultant	Trust Officer
Other (please explain)		

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- ~ A link to your company's web site on the patrons page of the Council's web site.

MEETING SPONSOR – \$400

- ~ Company name on all meeting notices.
- ~ Attendance for 2 at the event.
- ~ Display of materials promoting your firm.
- ~ Verbal recognition at the event.
- ~ Multiple sponsors for the event
- ~ Honorary membership in the Council for current membership year.

For more information contact Abby Murray at :
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What Will Your Legacy Be?

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Executive Director

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Fax: 856-210-1619

Estate & Financial Planning Council of Southern New Jersey

Membership Application

Apply online at www.EFPCSNJ.org

Name: _____

Title: _____

Company: _____

Address: _____

Phone: _____ Fax: _____

Email: _____

I am actively engaged in the estate and/or financial planning profession in _____ county for _____ years.

I hold a license or designation/certification and am a member in good standing in the following:
_____ Attorney _____ CPA _____ CFP _____ ChFC _____ CLU
_____ CTFA or qualified professional employed in tax, trust or estate practice by a financial services firm.

Or I have a _____ certification/designation.

My area of discipline(s): _____ Accountant _____ Attorney _____ Financial Planner
_____ Reverse Mortgage Consultant _____ Insurance _____ Trust Officer

Or: I have been involved in this industry as: _____

Or I would like to apply to be a member of EFPCSNJ under one of the following NEW non-voting member categories: _____ Student (\$25 annually) For students attending undergraduate or graduate programs)

_____ Faculty (\$40 annually) For University/College faculty

_____ Young Professional (\$75 annually) For young professionals 35 years of age or less that do not have the necessary credentials or experience but are working towards full membership

_____ Associate Member (\$195 annually) for people that provide services to the clients of EFPCSNJ members but do not have the necessary designations to become a full member and are not primarily involved in the financial planning process.

Associate Members are offered a \$100 discount on one EFPCSNJ Breakfast Meeting Sponsorship.

Signature: _____ Date: _____

Recommended by Member: _____
(please print)

Signature of Member: _____

Membership cost: \$170 per year. You can also submit your membership application online at www.efpcsnj.org. Corporate membership is available.

More information can be found at www.EFPCSNJ.org.

Tim Bower, CAE

Executive Director

PO Box 460

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Estate & Financial Planning Council of Southern New Jersey

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Call for Articles

Please consider submitting an article for inclusion in future newsletter issues. We are now seeking articles for the EFPCSNJ newsletters.

Articles should be between 1,200 and 2,000 words
which is usually three to six typed pages.

Submissions should be sent as a word document to Abby Murray at
efpcsnjmbbrsvcs@bowermanagementservices.com.

This is a great way to get involved with EFPCSNJ and to share knowledge and information with the rest of the members.

To view recent newsletters please visit the EFPCSNJ website (www.efpcsnj.org) and go to Documents.