

2019-2020 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 19, 2019

Topic: Planning for the Back 9: What you need to know about Business Succession
Speakers: Tiffany Donio Esq. – Archer & Greiner, Ken Harris Esq. – Harris Law Offices, Chris Vassalo, CFP – RTD Financial
Location: **TOP GOLF**, Mt. Laurel, NJ
Schedule: Registration: 4:30pm – 5:30pm, Opening Remarks: 5:15pm – 5:30pm, Educational Program: 5:30pm – 6:30pm, Food/Drinks/Golf: 6:30pm – 8:30pm
EXCLUSIVE Sponsor: RTD Financial

Thursday, November 21, 2019

Topic: It's Already November – Have you talked to your clients about Charitable Planning?
Speakers: Jamie McCann – American Cancer Society, Yasmeen Khaleel Esq. – Capehart Scatchard, Lee Shields, CPA – Friedman, LLP
Location: Samaritan Healthcare and Hospice – 265 Route 73 South, Voorhees, NJ 08043
Schedule: Breakfast 8:00 am; Program 8:30-9:30am
EXCLUSIVE Sponsor: Invesco

Thursday, January 16, 2020

Topic: Tax Law Update
Speakers: Attorneys form Kulzer & DiPadova
Location: Laurel Creek Country Club, 701 Centerton Rd., Mt. Laurel, NJ
Schedule: Breakfast 8:00 am; Program 8:30-9:30am
Sponsors: There are **three** sponsorships available.
Do not miss this opportunity to sponsor an EFPCSNJ Event. Call 856-795-0551 Today!

Thursday, February 20, 2020

Topic: Estate Planning – The Latest Update from Florida
Speakers: Martyn Babitz, J.D. – BNY Mellon Wealth Management, Glenn Henkel, Esquire – Kulzer & DiPadova
Location: Laurel Creek Country Club, 701 Centerton Rd., Mt. Laurel, NJ
Schedule: Breakfast 8:00 am; Program 8:30-9:30am
Sponsors: There are **three** sponsorships available.
Do not miss this opportunity to sponsor an EFPCSNJ Event. Call 856-795-0551 Today!

Thursday, May 21, 2020

Topic: Avoiding Digital Disasters: Digital Assets in Estate Planning and Administration
Speakers: Karen A. Fahrner, Esq. – Heckscher, Teillon, Terrill & Sager, P.C
Andy DeMaio, Esq., Neff Aguilar, LLC
Location: Laurel Creek Country Club, 701 Centerton Rd., Mt. Laurel, NJ
Schedule: Breakfast 8:00 am; Program 8:30am-9:30am
Sponsors: There are **three** sponsorships available. Do not miss this opportunity to sponsor an EFPCSNJ Event. Call 856-795-0551 Today!

June 4, 2020

EFPCSNJ Installation and Awards Dinner
Location: TBD
Schedule: 6:00pm - 9:00pm
Sponsors: There are **six** sponsorships available. Do not miss this opportunity to sponsor an EFPCSNJ Event. Call 856-470-4521 Today!

INTERESTED IN SPONSORING AN EVENT?!

If you are interested in sponsoring an EFPCSNJ meeting in the 2019–2020 Meeting Year, please contact Abby Murray at 856-795-0551.