

Estate & Financial Planning Council of Southern New Jersey



Member of the National Association of Estate Planners and Councils

SEPTEMBER 19, 2013 EDUCATIONAL EVENT

Your Online Marketing Toolbox-How to Put it to Work

SPEAKER:

Bob DeStefano from SVM E-Marketing Solutions

Location: The Mansion on Main Street, Voorhees, NJ

Schedule: Cocktails 5:30 p.m., Dinner 6:15 p.m., Program 7:00 p.m. (1.5-Hour)

Cost: Members \$50; Guests \$65

To Register go to www.efpcsnj.org

Sponsor:



www.seniorwisecare.org

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REMINDER...

- **MEMBERSHIP RENEWAL NOTICES:**
Membership renewal notices have been sent to all active members. If you have not received a notice please call Tim Bower at 856-795-0551.
- **COUNCIL WEB SITE:**
Visit www.EFPCSNJ.org for the latest Council information, register for events and view the membership directory.
- **MEMBERSHIP REWARDS:**
Member-Get-A-Member: Free attendance at the next meeting if your guest becomes a Council member.



LETTER FROM THE PRESIDENT



Dear Council Members:

I am extremely excited to begin my term as the President of the EFPCSNJ. I hope everyone had a wonderful evening at the Installation Dinner. The staff of Duo Catelli prepared a delicious dinner and the ambiance was wonderful. I want to once again congratulate John Hempstead, this year's recipient of the Founders Award. John's many years of service and participation in the council made him a worthy honoree. On behalf of the Board and council members, I want to thank Diane for a great year as President. Her commitment and dedication this past year helped steer the council on the path of continued growth and success. I also want to take this opportunity to welcome Mark Penny to the Board. Mark's many years of business experience make him a valuable asset to the Board.

I want to thank the newsletter, educational program and installation dinner sponsors who continually support the council, and enable us to present exceptional educational programs and social events.

The Board convened in May to plan our educational programs and activities for this coming year. Our goal is to continue to grow the membership of the council and we encourage all of our members to bring a peer or colleague to our upcoming programs. With the assistance of the Board and staff, I plan on working on implementing the initiative Tony and Diane started including the Mentoring Program and new website design.

In closing, I wish everyone an enjoyable fall season and look forward to seeing everyone at our September 19th event.

Sincerely,
Raymond M. Giunta, CPA/PFS
Council President

SAVE THE DATES FOR THE 2013-2014 EDUCATIONAL PROGRAM YEAR

THURSDAY, SEPTEMBER 19, 2013

TOPIC: YOUR ONLINE MARKETING TOOLBOX-HOW TO PUT IT TO WORK

SPEAKER: BOB DESTEFANO FROM SVM E-MARKETING SOLUTIONS

LOCATION: THE MANSION ON MAIN STREET, VOORHEES, NJ

SCHEDULE: COCKTAILS 5:30 P.M.; DINNER 6:15 P.M.; PROGRAM 7:00-8:30 P.M.

TO REGISTER GO TO WWW.EFPCSNJ.ORG

THURSDAY, NOVEMBER 21, 2013

TOPIC: SOCIAL SECURITY PLANNING

LOCATION: THE MANSION ON MAIN STREET, VOORHEES, NJ

SCHEDULE: BREAKFAST 8:00 A.M.; PROGRAM 8:30-9:30A.M.

THURSDAY, JANUARY 16, 2014

TOPIC: ELDER CARE FAIR

LOCATION: TAVISTOCK COUNTRY CLUB, HADDONFIELD, NJ

SCHEDULE: COCKTAILS 5:00 P.M.; DINNER 6:00 P.M.; OPENING REMARKS 6:45 P.M.; EDUCATIONAL PROGRAM 7:00-8:30 P.M.

THURSDAY, MARCH 20, 2014

TOPIC: BUSINESS SUCCESSION PLANNING

LOCATION: THE ENTERPRISE CENTER AT BCC, MT. LAUREL, NJ

SCHEDULE: BREAKFAST 8:00 A.M.; PROGRAM 8:30-9:30A.M.

THURSDAY, MAY 22, 2014

TOPIC: DIVORCE PLANNING

LOCATION: THE MANSION ON MAIN STREET, VOORHEES, NJ

SCHEDULE: BREAKFAST 8:00 A.M.; PROGRAM 8:30-9:30A.M.

THURSDAY, JUNE 5, 2014

INSTALLATION OF OFFICERS AND MEMBER AWARDS DINNER

LOCATION: TO BE ANNOUNCED

Council News

EFPC of SNJ Online Membership Directory

We want to make sure you have access to the best possible resources and events possible. One of the great benefits of being a member of EFPC of SNJ is the networking with your peers. This networking is a great way to share ideas and cultivate business relationships. Networking does not only happen at our educational sessions. Networking can happen anytime with our Online Membership Directory. This directory allows EFPC of SNJ members to connect with other members and gain access to resources that you need to compete in the current marketplace. One of the items in the directory that is not frequently used is the ability to post a picture in your profile. I urge you to start using the directory and to send a picture of yourself that you would like included in the directory. Please send pictures to me at efpscnj@mail.com. Pictures should be sent as a .jpg file.

If you have questions about accessing the directory please email me and either Abby Murray or I will get back to you with the information you need to start using this important resource.

Thank you,
Tim Bower, CAE

Council Sponsorship

Becoming a Council sponsor is a great way to support the Council and promote your company's commitment to the financial services profession. There are several sponsorship opportunities available this year.

GOLD SPONSOR – \$475

- ~ A 1/4 page ad in every newsletter.
- ~ A link to your company's web site on the patrons page of the Council's web site.

SILVER SPONSOR – \$300

- ~ A business card size ad in every newsletter.

EXCLUSIVE MEETING SPONSORSHIP – \$750

- ~ Company name on all meeting notices.
- ~ Attendance for 2 at the event.
- ~ Display of materials promoting your firm.
- ~ Verbal recognition at the event.
- ~ Five minutes at the start of the program to speak to the Attendees.
- ~ You will be the only sponsor at the event.
- ~ Honorary membership in the Council for current membership year.

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.
- ~ Five minutes at the start of the program to speak to the Attendees.
- ~ Multiple sponsors for the event
- ~ Honorary membership in the Council for current



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HEMPSTEAD RECEIVES 2013 ESTATE PLANNING FOUNDERS AWARD



The Estate and Financial Planning Council of Southern New Jersey has conferred its 2013 Founders' Award on John Hempstead, Managing Director of Hempstead & Co., LLC. The award is given in recognition of the recipient's distinguished service to the estate planning profession. Hempstead is the founder of Hempstead & Co. a Haddonfield-based business valuation firm which has since 1977 provided appraisals to the estate planning community. Mr. Hempstead is a Past President of EFPC of SNJ.



Council Immediate Past President Diane Bakley presents the Founders Award to the 2013 winner John Hempstead.

William S. Merriken, Jr., ChFC

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Raymond M. Giunta, CPA, PFS
giunta@baratzcpa.com

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SAVE THE DATES

FOR THE 2013-2014 EDUCATIONAL PROGRAM YEAR

Thursday, September 19, 2013

Topic: Your Online Marketing Toolbox-How to Put it to Work

Speakers: Bob DeStefano from SVM E-marketing Solutions

Location: The Mansion on Main Street, Voorhees, NJ

Schedule: Cocktails 5:30 p.m.; Dinner 6:15 p.m.; Program 7:00-8:30 p.m.

Sponsors: SeniorWise Care Management

Sponsorship Opportunities are Still available - Do not miss this opportunity to sponsor an EFPCSNJ Event - Call 856-795-0551 Today!

Thursday, November 21, 2013

Topic: Social Security Planning

Location: The Mansion on Main Street, Voorhees, NJ

Schedule: Breakfast 8:00 a.m.; Program 8:30-9:30a.m.

Sponsors: SeniorWise Care Management

Sponsorship Opportunities are Still available - Do not miss this opportunity to sponsor an EFPCSNJ Event - Call 856-795-0551 Today!

Thursday, January 16, 2014

Topic: Elder Care Fair

Location: Tavistock Country Club, Haddonfield, NJ

Schedule: Cocktails 5:00 p.m.; Dinner 6:00 p.m.; Opening Remarks 6:45 p.m.; Educational Program 7:00-8:30 p.m.

Sponsor: IKOR of Bucks & Mercer Counties

Vendor Table: LifeSpan Care Management, Lincoln Investment Planning, SeniorWise Care Management

Sponsorship, Vendor Tables and Directory Ads are still available.

- \$500 for meeting sponsor, vendor table and ½ page ad in directory (limited to 3) (\$450 for Gold Newsletter sponsors) – 2 free registrations
 - \$250 for vendor table and ¼ page ad in directory (\$225 for Gold Newsletter sponsors)- 1 free registration
- \$75 for directory ¼ page ad only (\$50 for Gold Newsletter sponsors) – no free registrations
- Sponsorship Opportunities are Still available - Do not miss this opportunity to sponsor an EFPCSNJ Event - Call 856-795-0551 Today!

Thursday, March 20, 2014

Topic: Business Succession Planning

Location: The Enterprise Center at BCC, Mt. Laurel, NJ

Schedule: Breakfast 8:00 a.m.; Program 8:30-9:30a.m.

Sponsorship Opportunities are Still available - Do not miss this opportunity to sponsor an EFPCSNJ Event - Call 856-795-0551 Today!

Thursday, May 22, 2014

Topic: Divorce Planning

Location: The Mansion on Main Street, Voorhees, NJ

Schedule: Breakfast 8:00 a.m.; Program 8:30-9:30a.m.

Sponsorship Opportunities are Still available - Do not miss this opportunity to sponsor an EFPCSNJ Event - Call 856-795-0551 Today!

Thursday, June 5, 2014

Installation of Officers and Member Awards Dinner

Sponsors: Capehart Scatchard

Sponsors: 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 a specific educational session please contact Tim Bower ASAP at 856-795-0551. There are two levels of meeting sponsorship. EFPC-SNJ offers a \$400 level that allows for multiple sponsors at the meeting and an exclusive sponsorship level at \$750 where your organization will be the only company sponsoring. Both levels provide the opportunity for your company to provide a brief overview of what your organization does and attendance for 2 staff members at the event. We do expect the limited sponsorship opportunities we have available to be taken quickly.

2013 INSTALLATION AND AWARDS DINNER



Members and guests take some time to enjoy some great food and some great company. The Installation and Awards dinner is an excellent time to connect with past acquaintances and make some new connections. Everyone had a great time and if you could not join us this year I hope you will be able to join us in 2014.

EFPC of SNJ would like to thank the sponsors of the Installation and Awards Dinner:

***Archer & Greiner P.C., Baratz & Associates, P.A.,
Capehart & Scatchard, Hempstead & Co.
and PNC Wealth Management.***



Guests enjoy a great dinner and some great conversation.



Council Outgoing President Diane Bakley presents the Founders Award to the 2013 winner John Hempstead.



Tony La Ratta EFPC-SNJ Past President swears in the 2013-2014 Council Board. From left are Diane Bakley, Ray Giunta, Jamie Shuster Morgan, Will Merriken and Mark Penny (absent from photograph is Yasmeen Khaleel)



Outgoing President Diane Bakley officially passes the gavel to Incoming President Ray Giunta



Council President Ray Giunta acknowledges Immediate Past President Diane Bakley for her distinguished service to the Council.



Council President Ray Giunta takes the podium for his opening remarks as Council President.

Tim Bower, CAE

Executive Director

PO Box 460

Collingswood, NJ 08108

Phone: 856-795-0551

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Estate & Financial Planning Council of Southern New Jersey

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One Centennial Square
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