

Estate & Financial Planning Council of Southern New Jersey



Member of the National Association of Estate Planners and Councils

MEETING ANNOUNCEMENT SAMUARI ESTATE PLANNING - CUTTING EDGE CONCEPTS FOR 2015

Thursday, September 18, 2014

Tavistock Country Club
100 Tavistock Lane, Haddonfield, NJ

Speakers:

Kevin DiMedio, Esq.
Gary DeVicci, MSFS, CFP
David Gill, CPA/PFS, CFP

This meeting is generously sponsored by:



For additional information please see Page : 8

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REMINDER...

- ***EFPCSNJ September Breakfast Meeting***
Thursday, September 18, 2014 details on page 8
- ***EFPCSNJ Membership Renewal Form:*** page 7
- ***Mark Your Calendars!***
EFPCSNJ 2014-2015 Meeting Schedule on page 3



LETTER FROM THE PRESIDENT

Dear Council Members:



I am honored to serve as President of the EFPCSNJ for the next year. My presidency started with the honor of awarding the founders award to a jurist I hold in high regard and had the great pleasure of calling my colleague, Mr. Blaine Capehart. Sharing the evening with his family including his son-in-law and my now retired partner Richard De-Cou was an added bonus. I hope the attendees of this year's Installation Dinner enjoyed the more informal and social gathering hosted at the Aloft.

On behalf of the Board and council members, I want to recognize the service of our immediate past president Raymond M. Guinta and thank him for his leadership and guidance. He has continued our recent trend of growth and success and I hope to continue his legacy. As Ray leaves the board, I am afforded the opportunity to welcome our newest board member, board secretary Henry E. Kramarski, CFP. Henry is the founder of Legacy Wealth Management Group, LLC. and has served the financial community for over 32 years. Welcome Henry!

I also want to acknowledge and thank the newsletter, educational program and installation dinner sponsors who continually support the council. These sponsorships enable us to present informative and interesting educational programs and our annual installation dinner. I hope in the coming year we have the opportunity to meet new sponsors and grow our support base.

In my first official act as President, our Board convened in June for our annual planning meeting. I am pleased to report that in a single meeting we were able to set our agenda for the coming year's programs and secure our speakers. It is with great pleasure that our programs for the 2014-2015 council year are presented in this newsletter.

As for my goal as President, I want to empower the youth of our profession to take a leading and laboring oar this year. While I appreciate the familiar faces I have come to expect over the last 15 plus years as a member, we owe it to our council to encourage leadership from the newest members of our community. Please join me in my effort to identify and motivate the active participation of worthy candidates.

In closing, I hope everyone is having an enjoyable summer and looking forward to reconvening in the fall at our September 18th event.

Sincerely,
Yasmeen S. Khaleel, Esq.
Council President

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

2014-2015 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 18, 2014

Topic: Samurai Planning: Cutting Edge Concepts for 2015

Speakers: Gary DeVicci, MSFS, CFP,

David J. Gill, Jr. MST, CPA/PFS, CFP

Kevin J. DiMedio, Esq.

Location: Tavistock Country Club, 100 Tavistock Lane, Haddonfield, NJ 08033

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

Thursday, November 20, 2014

Topic: IRS Disputes

Location: The Mansion on Main Street, Voorhees, NJ

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

Sponsors: Sponsorship Opportunities are Still available

Thursday, January 22, 2015

Topic: EFPCSNJ 2nd Annual Elder Care Legal Forum

Location: Tavistock Country Club, Haddonfield, NJ

Schedule: Vendor Showcase & Cocktail Hour—4:30pm.; Dinner 6:00 p.m.; Opening Remarks 6:45 p.m.

Educational Program 7:00-8:30 p.m.

Sponsors: Sponsorship Opportunities are Still available. Additional information on Sponsorships and Vendor Tables will be emailed and posted on the EFPCSNJ website in the near future.

Thursday, March 19, 2015

Topic: The Money Pit

Speaker: Bob Baker, Esq.

Location: The Mansion, Voorhees, NJ

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

Sponsors: Foundation Title and The Stewart Group

Sponsorship Opportunities are Still available

I

Thursday, May 21, 2015

Topic: Asset Protection

Location: The Mansion on Main Street, Voorhees, NJ

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

Sponsors: Sponsorship Opportunities are Still available

Thursday, June 4, 2014

Installation of Officers and Member Awards Dinner

Location: TBD

Time: 6:00 p.m.—9:00 p.m.

Sponsors: Sponsorship Opportunities are Still available

INTERESTED IN SPONSORING AN EVENT?

Do not miss this opportunity to sponsor an EFPCSNJ Event - Call 856-795-0551 Today!
If you are interested in sponsoring an EFPCSNJ meeting in the 2014–2015 Meeting Year,
please contact Abby Murray at 856-795-0551.

EFPC of SNJ 2014 Installation of Officers and Awards Dinner



Outgoing President Ray Giunta officially passes the gavel to Incoming President Yasmeen S. Khaleel.



Diane Bakley EFPC-SNJ Past President swears in the 2014-2015 Council Board. From left are Ray Giunta, Henry Kramarski, Mark Penny, Jamie Shuster Morgan, Will Merriken and Yasmeen S. Khaleel.



EFPC of SNJ thanks Ray Giunta for his excellent and dedicated service.



Council President Yasmeen S. Khaleel takes the podium for her opening remarks as Council.

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

***Capehart Scatchard, P.A., Friedman, LLP
Jonathan G. Furlow, CPA, PNC Wealth Management,
Wilmington Trust***

EFPC of SNJ 2014 Installation of Officers and Awards Dinner



EFPC of SNJ posthumously awarded the 2014 Founders Award to Mr. Blaine Capehart. The plaque as well as some pictures of Mr. Capehart were displayed during the cocktail hour.



EFPC of SNJ President Yasmeen S. Khaleel presents the plaque for the 2014 Founders Award to Joseph Bevis Esquire, Mr. Capehart's grandson.



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 2015.



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2014-2015 DUES

Description	Amount
Individual Member @ \$150	
*Discount Special \$135 until September 30th.	
Corporate Members – first 4 members @ \$150	
*Discount Special \$135 until September 30th.	
Corporate Members – 5th member and more @ \$100	
Total	
<p>*Save \$15 on dues paid on or before 9/30/14 × \$150 for dues paid after 10/1/14</p> <p>Please make check payable to EFPCSNJ and mail to: PO Box 460, Collingswood, NJ 08108</p> <p>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. An email with your username and password will be emailed to you on Wednesday, August 27th, 2014 with other renewal information. If you have questions or would like your username and password, please contact Abby Murray at efpcsnjmbrsvcs@bowermanagementservices.com or 856-795-0551</p>	

BENEFITS OF MEMBERSHIP

- Access to National web site and all it's resources
- Quality speakers at the meetings
- Great networking opportunities

CONTACT INFORMATION

- Continuing education credits at every meeting
- Access to great resources through the membership directory

Member: _____

Nickname: _____

Discipline**: _____

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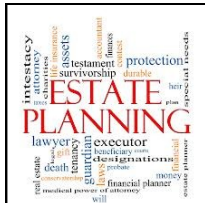
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Attorney	Accounting	Financial Planning
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Other (please explain)		

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SAMUARI ESTATE PLANNING - CUTTING EDGE CONCEPTS FOR 2015



Date: Thursday, September 18 2014

Location: Tavistock Country Club, 100 Tavistock Lane, Haddonfield, NJ 08033

Speakers: Kevin DiMedio, Esq., Gary DeVicci, MSFS, CFP®, David Gill, CPA/PFS, CFP

From Baby-Boomers to Boomerangers. From the merely successful to the mega- wealthy. This session is a primer on current success strategies for wealth accumulation, preservation and transfer.

This Meeting is generously sponsored by:



Sponsorship Opportunities are Still available -

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We are applying for this meeting to qualify for the following CE credits: 1.5 CPE credit (for CPAs), 1.5 CFP credits, PA CLE credits, NJ CLE credits

THANK YOU TO OUR CLE SPONSOR:



September Meeting Registration Form

NAME: _____ Member ____ Guest ____

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Member: \$50 Guest: \$65 Enclosed is my check for \$_____ payable to:

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

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- ~ 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 Tim Bower at EFPCSNJ@mail.com

Tim Bower, CAE

Executive Director

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Phone: 856-795-0551

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Membership cost: \$150 per year. You can also submit your membership application online at www.efpcsnj.org. Corporate membership is available.

Tim Bower, CAE

Executive Director

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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
efpcsnjmbrsvcs@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.