

Indian River

ESTATE PLANNING COUNCIL

2025-2026 Season

Dear Indian River Estate Planning Council Members (and Prospective Members):

I hope you all have had a great summer! The Indian River Estate Planning Council is looking forward to our 2025-2026 season, which kicks off on Thursday, September 4th at 4:45 pm at 21st Amendment Distillery in Downtown Vero! Please see below some information regarding the upcoming season.

Membership. Attached is the Membership Application for the 2025-2026 year. Please complete and sign the application and return it, along with a check payable to the Indian River Estate Planning Council in the amount of \$300, to the address indicated on the application by October 1, 2025. You will note that our membership fee has increased \$50 from \$250 due to rising costs and our renewed focus to provide substantive estate-planning learning opportunities. We have done our best to keep this adjustment as minimal as possible and look to provide CE/CLE/CPE credit opportunities in this season's programming.

In submitting your Membership Application, please kindly note that our council is an association of area professionals whose expertise spans multiple disciplines of estate planning and taxation. Our members are Attorneys At Law, Certified Public Accountants, Certified Financial Planners, Chartered Financial Consultants, Chartered Life Underwriters, Trust Officers, and Development Directors employed by a not-for-profit as defined in IRS Code Section 501(c)3. Accordingly, for those who may be concentrated or interested specifically in charitable giving, we would encourage you to consider The Planned Giving Council of Indian River (<https://www.pgcir.org>).

We also ask that you take the time to answer the optional survey questions listed on the application. We appreciate your input and thank you in advance for your suggestions. Finally, we encourage all Members to recruit their qualified friends and colleagues in the estate planning field who may not yet be members of IREPC to apply! Our application is available under the membership tab of our website, irepc.org.

Calendar of Events. Our regular dinner meetings will once again be held at the Quail Valley Riverfront Dining Room located on A1A in Vero Beach. The meeting format is the same as last year: Cocktails begin at 5:15 p.m., followed by dinner at 6:00 p.m. The speaker will begin around 6:15 p.m. and finish up by 7:00 p.m. or so. Below is a calendar of our events as well as information on sponsoring our events. We very much appreciate your continued support, and we hope to see you all very soon.

The following dates have been confirmed (please be sure to put these dates on your calendar!):

Thursday, September 4, 2025

Joint Kick-Off Happy Hour with Planned Giving Council
21st Amendment Distillery
2055 13th Avenue
Vero Beach, FL 32960
4:45pm-5:45pm

Thursday, October 9, 2025

Quail Valley River Club
2345 Highway A1A
Vero Beach, FL 32963
5:15pm-7:00pm
Speaker: TBD!
Sponsor: Open!

Thursday, November 13, 2025

Quail Valley River Club
2345 Highway A1A
Vero Beach, FL 32963
5:15pm-7:00pm
Speaker: Michele Miller, Sr. Fiduciary Officer
Sponsor: Northern Trust

Thursday, February 5, 2026

Quail Valley River Club
2345 Highway A1A
Vero Beach, FL 32963
5:15pm-7:00pm
Speaker: TBD!
Sponsor: Open!

Thursday, May 14, 2026

Joint Meeting with Planned Giving Council
Quail Valley River Club
2345 Highway A1A
Vero Beach, FL 32963
5:15pm-7:00pm
Speaker: TBD!
Co-Sponsors: Open!

Anita Calabro, our new Membership Coordinator, will send you a reminder prior to each meeting. We ask that you please RSVP to her at anita.calabro@cypressbanktrust.com so we can get an accurate head count to Quail in advance of each meeting.

Sponsorship Opportunities. Sponsoring a meeting is a great way to support IREPC and have your organization recognized by the local estate planning community, and we greatly appreciate your support! Sponsors are listed on the website, recognized as a presenting sponsor the day of the event, given the opportunity to talk about their organization prior to the speaker's address. Also, if your organization wishes to have a speaker present on an estate planning topic of value to our membership, sponsoring the dinner for that speaker makes for a great pairing showcase for your organization. If you are interested in sponsoring an event for the 2025-26 season, please reach out to me or one of our Board members for more details.

Current Board Members and Officers. I would like to thank our immediate past president, Eva Lauer, for leading us last year! Under her leadership we continued a significant uptick in membership!

I would also like to say thank you to our 2025-2026 Board Members and Officers:

President:	Stephanie LeBlanc (Lawn & LeBlanc)
Vice President:	Samia Bennouna (Gould Cooksey Fennell)
Treasurer:	Hudson P. Fennell (Offutt Barton Schlitt)
Secretary:	Taylor Kennedy Lubas (Collins Brown)
Immediate Past President:	Eva Lauer (Lauer Law)
• Board Member:	Jim Beindorf (SpirePoint)
• Board Member:	Justin Larson (Gould Cooksey Fennell)
• Board Member:	Will Schlitt (Offutt Barton Schlitt)
• Board Member:	Jeff Pickering (Indian River Community Foundation)
• Board Member:	Nick Bruce (Bruce Estate Law)
• Board Member:	Gloria Nicely (PNC)
• Board Member:	Melissa Weaver (Northern Trust)
• Board Member:	Beckett Horner (Block & Scarpa)
• Board Member:	Richard Johnson (Emeritus)

If you are interested in joining the IREPC Board, or know a dynamic colleague who may be interested, please let us know! We are always looking for fresh energy and new perspectives on our Board, and we welcome your qualified nominations and volunteers!

If you have questions, please feel free to reach out to me, any of the other board members, or Anita Calabro. You may also visit our website at www.irepc.org for more information about our organization, as well as future updates regarding member meetings and events.

Thanks so much, and we look forward to seeing you soon!

Sincerely,

Stephanie M. LeBlanc

Stephanie M. LeBlanc, President (2025-2026)