

Indian River

ESTATE PLANNING COUNCIL

2023-2024 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 2023-2024 season, which kicks off next Thursday, September 14th at Sailfish Brewery on Ocean Drive in Vero Beach! Please see below some information regarding the upcoming season.

Membership. Attached is the Membership Application for the 2023-2024 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 \$250, to the address indicated on the application by October 1, 2023. 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!

Calendar of Events. For this upcoming 2023-2024 season, we are happy to be collaborating once again with the Planned Giving Council of Indian River on several events. Our Kick-Off happy hour will take place at Sailfish Brewing Company and will be a joint event held in partnership with the Planned Giving Council of Indian River. 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 6:30 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 14, 2023

Joint Kick-Off Happy Hour with Planned Giving Council
Sailfish Brewing Company
2855 Ocean Drive
Vero Beach, FL 32963
5:15pm-6:15pm

Thursday, October 19, 2023

Quail Valley River Club
2345 Highway A1A
Vero Beach, FL 32963
5:15pm-7:00pm
Speaker: Dillon L. Roberts (Business Succession in Estate Administration)
Sponsor: Gould Cooksey Fennell, PLLC

Post Office Box 2098
Vero Beach, FL 32961-2098
www.irepc.org

Thursday, November 16, 2023

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

Thursday, February 8, 2024

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

Thursday, May 2, 2024

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

Blanche Necessary, our Membership Coordinator, will send you a reminder prior to each meeting. We ask that you please RSVP to her at bencssry@aol.com so we can get an accurate head count to Quail in advance of each meeting.

Sponsorship Opportunities. There are currently dinner sponsorship opportunities remaining for the November and February 2024 events! Sponsoring an event 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 2023-24 season, please reach out to me or one of our Board members for more details. Thanks very much to all of our sponsors, without whom these events are not possible.

Current Board Members and Officers. Thank you to our 2023-2024 Board Members and Officers:

President:	Justin Larson (Gould Cooksey Fennell)
Vice President:	Eva Lauer (Lauer Law)
Treasurer:	Eva Lauer (Lauer Law)
Secretary:	Stephanie LeBlanc (Lawn & LeBlanc)
Immediate Past President:	Beckett Horner (Block & Scarpa)

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Board Member:	Jim Beindorf (Morgan Stanley)
Board Member:	Taylor Lubas (Collins Brown Barkett)
Board Member:	Will Schlitt (Offutt Barton Schlitt)
Board Member:	Jeff Pickering (Indian River Community Foundation)
Board Member:	Nick Bruce (UBS)
Board Member:	Gloria Nicely (PNC Wealth Management)
Board Member:	Melissa Weaver (Northern Trust)
Board Member:	Samia Bennouna (Gould Cooksey Fennell)
Board Member:	Richard Johnston (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 Blanche Necessary. 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,

Justin K. Larson, President (2023-24)

Indian River

ESTATE PLANNING COUNCIL

MEMBERSHIP APPLICATION

NAME: _____

FIRM NAME: _____

FIRM ADDRESS: _____

WEBSITE: _____

PHONE: _____ EMAIL: _____

MEMBERSHIP STATUS: ☐ Renewing ☐ New Member

DISCIPLINE: ☐ Attorney ☐ Certified Public Accountant
☐ Trust Officer ☐ Certified Financial Planner
☐ Chartered Life Underwriter
☐ Other (please specify): _____

PROFESSIONAL DESIGNATIONS:

1. What estate planning topics are you interested in hearing about and discussing at our meetings?

2. Would you recommend a speaker (you may volunteer yourself)? Please indicate the topic.

Date

Signature

Membership dues are \$250 and include meals for all Council meetings.

Please make your check payable to INDIAN RIVER ESTATE PLANNING COUNCIL. Mail your check and completed application to: Indian River Estate Planning Council, PO Box 2098, Vero Beach, FL 32961-2098.

To attend as a Guest, please contact: Blanche Necessary, Membership Coordinator
bencssry@aol.com

Post Office Box 2098
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EIN: 59-2140522