

Philadelphia Estate Planning Council



The Preeminent Organization For Estate Planning Professionals in the Philadelphia Area

Accountants • Attorneys • Educators • Financial Planners • Investment Professionals • Insurance Professionals
Planned Giving Professionals • Trust Officers • Valuation Experts

Council Goals

The goals of the Philadelphia Estate Planning Council are:

- To educate members on traditional estate planning topics as well as current developments in the estate planning field.
- To foster understanding of the proper relationship between functions of various estate planning professionals, such as attorneys; accountants; educators; financial planners; investment, life insurance and planned-giving professionals; trust officers and valuation experts, and to encourage the co-operation of practitioners within those disciplines to the benefit of our mutual clients;
- To support and promote proper ethical standards in dealing with one another, our mutual clients and the public;
- To aid and improve the process of careful estate planning and the rendering of the highest possible quality of service to our clients.
- To promote the sharing of estate planning information among council members, both within and outside of their own discipline.

Member Benefits

The Philadelphia Estate Planning Council is a nationally recognized interdisciplinary organization for professionals involved in estate planning. It provides its members with opportunities to enhance their skills and expand their network through programs and interaction.

Membership allows you to:

- Participate in study groups on topics of interest to estate planning professionals.
- Gain entry to the members only section of the PEPC website which includes access to: council membership directory, posting of questions, events calendar, resource library, meeting registration, past newsletters, and

classifieds. Members can also obtain audio files and handouts for lectures.

- Attend roundtable luncheons where practical problems are analyzed and discussed in a small group setting.
- Receive newsletters regarding substantive topics in the field.
- Attend monthly luncheon meetings with scheduled lectures by leaders in the field with continuing education credits available for all disciplines.

**Please note that solicitation of members is not permitted*

Committee Opportunities

Active participation on one or more committees enhances the networking opportunities for PEPC members as well as serve a variety of organizational objectives

Ethics: This committee meets to share ideas and encourage open discussion of current ethical issues facing members of the estate planning community. The committee meets several times throughout the year.

Long Range Planning: This committee identifies priorities, opportunities and challenges to advance the Council's mission and recommends activities designed to achieve these goals. The committee meets several times throughout the year.

Membership: The Membership Committee seeks to attract qualified candidates for membership in the Council, and to retain members by continually reviewing, refining and recommending ways to enhance the overall Council experience. The Committee typically meets about six times a year.

Newsletter: This committee identifies topics for original articles that are of interest to the member's practices. It solicits authors and edits their submissions for publication in the Council's newsletter. The committee meets three to four times per year.

continued on page 2

Program: PEPC attracts the nation's preeminent experts on estate planning matters to speak at the monthly luncheon meetings, annual seminar and roundtable discussions. This committee selects their speakers and meets three to four times a year in the fall.

Social: This committee coordinates the Council's social events throughout the year, including a Golf and Tennis Outing and Holiday Party. The Committee meets six to eight times per year.

Technology: This committee evaluates technology solutions for the benefit of its members. The Committee meets twice a year to update the PEPC web site, undertake improvements, solicit feedback and offer suggestions.

Women's Committee: This committee encourages networking and professional development for women in the Council. The committee meets four times a year.

Young Professionals: The mission of this committee is to encourage active participation and facilitate career development and growth opportunities that are tailored, through networking and educational programming, to newer members of the estate planning community. This group meets several times during the year.

What Our Members Say

"A wonderful opportunity to hear nationally known speakers on cutting edge topics and enjoy professional and social contact with the top professionals in various estate planning disciplines."

"As the estate planning area has become more complex, I have benefited from my association with the other professionals in related fields. This affords me the opportunity to analyze and discuss many issues of concern to my trust company clients."

"The networking opportunities are unsurpassed."

"The networking and professional advancement opportunities provided by the PEPC are unparalleled in the region. There is a great spirit of volunteerism that allows us to work together in a multi-disciplinary fashion."

"Although I've been in the business for many years, joining PEPC allowed me to dramatically expand my contacts in the legal, insurance and investment communities."

Advertising & Sponsorship Opportunities

PEPC provides exposure for advertisers and sponsors to over 1,000 of Philadelphia's top estate planning professionals.

Sponsorship opportunities include:

Monthly Luncheon Meetings (September – March)

Annual Meeting (May)

Social Events (Throughout the year)

Newsletter (Fall, Winter and Spring)

Foundation Series (Summer)

Roundtable Sessions (Throughout the year)

Sponsorship benefits vary by event but may include sponsor's name on meeting notice, recognition from the podium, banners and signage, promotional brochures, complimentary admission, quarter page ad in the PEPC Newsletter and discounts for consecutive ads.

What Our Sponsors Have Said

"As a large national firm, we have found the PEPC sponsorship opportunities to be an excellent and efficient use of our marketing resources and an important way to establish our presence in the Philadelphia market."

"The ability to reach the best estate planners in the Philadelphia area is well worth the sponsorship investment."

"Being a sponsor of the PEPC has been a positive experience for our firm, and has provided good returns over in the long run. We will continue to support the Council in the future."

"The audience that attends PEPC lunches is the target group that I want to reach. It is a good use of our marketing resources."

For more information or to apply for membership contact visit: <http://philaepc.org/> and apply online. You can also contact the Council at:

P.O. Box 579

Moorestown, NJ 08057

Phone: (856) 234-0330

Fax: (856) 727-9504

Denise.Downing@comcast.net