



## FEBRUARY LUNCHEON PROGRAM

### “PREPARING THE NEXT GENERATION FOR WHAT’S AHEAD”

TUESDAY, FEBRUARY 19, 2019

THE UNION LEAGUE  
140 SOUTH BROAD STREET  
PHILADELPHIA, PA 19102

11:45 – 12:00 P.M. REGISTRATION  
12:00 – 12:30 P.M. LUNCHEON  
12:30 – 1:45 P.M. PROGRAM

Often families are concerned with the impact of the wealth transfers on their children and grandchildren, but don't know how and when to start preparing them. Now that the lifetime gift exemption has increased, the issue is of even greater concern. This session will review the generational dynamics at work and offer practical steps to engage the rising generations in discussions about transfer strategies, values and intent.

**One Education Credit for CLE (PA Only), Insurance (PA Only), CFP,  
CPA (PA Only), PACE and CTFA will be offered.**

**Speaker:**

Donna Trammell is Director of Family Wealth Stewardship at Bessemer Trust. In this role, she leads next generation initiatives, working directly with clients to customize financial education curriculums, design and facilitate multigenerational family meetings, and help families make decisions about shared assets. She also leads the firm's Next Gen Client Advisory Council and annual Next Gen Client Workshop. Previously, she led the firm's Marketing team.

Prior to joining Bessemer, Donna worked in the private client group at Goldman Sachs. Before that, she held client relationship management positions at BBDO, Young and Rubicam, and Grey Advertising.

She is a noted speaker on the topic of raising good stewards of wealth and has been quoted in such publications as The Wall Street Journal and Worth magazine. Donna is certified as a family business advisor (FFI) and multigenerational facilitator (21/64). She regularly volunteers to teach financial literacy to teens from low-income households.

Donna earned a B.A. in history and English from Colgate University.

*This meeting is being sponsored by*

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# FEBRUARY 19, 2019 LUNCHEON PROGRAM REGISTRATION FORM

## Luncheon Program Fee:

PEPC Members	\$45	Non-Members	\$65
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## Additional Fees:

CLE Credit (Members)	\$15	CLE Credit (Non-Members)	\$15
Insurance Credit (Members)	\$15	Insurance Credit (Non-Members)	\$15
CFP® Credit (Members)	\$15	CFP® Credit (Non-Members)	\$15

*\$5 additional charge for walk-in registrations at the door without pre-registration.*

**No-shows will be billed. No refunds after February 15, 2019.**

## ATTENDEE INFORMATION:

Name: \_\_\_\_\_ Discipline: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

PEPC Member (\$45 per person)       Non-Member (\$65 per person)

Please select your lunch entrée:

Chicken Milanese, Fingerling Potato and Arugula, Roasted Pepper and Tomato Coulis

Eggplant Napoleon, Spinach Ricotta, Haricot Vert, Tomato Compote

Special Dietary Needs: \_\_\_\_\_

## CONTINUING EDUCATION INFORMATION:

(Members: Add \$15 per credit • Non-Members: Add \$20 per credit)

Continuing Legal Education (1 credit).....Attorney ID: \_\_\_\_\_

Insurance Continuing Education (1 credit).....License Number: \_\_\_\_\_

CFP® Continuing Education (1 credit).....Last 4 Digits of SSN: \_\_\_\_\_

*CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.*

## PAYMENT INFORMATION:

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at [www.philaepc.org](http://www.philaepc.org). **Members must be logged into the site to receive the discounted member pricing.**

**Return by Mail:** Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

**Return by Fax:** 856-727-9504      **Register Online:** [www.philaepc.org](http://www.philaepc.org)

**Questions:** 215-486-6215 (*Registrations will not be accepted via phone*)