



VIRTUAL ETHICS FORUM

“ETHICS OF WORKING FROM HOME”

TUESDAY, JUNE 15, 2021
8:30 – 10:30 A.M.

2020 threw us into the world of remote working and we plunged quickly into an entirely new set of working circumstances, new ways of communicating, new ways of transferring files and new ways of just about everything. In the chaos, we had no time to consider the potential ethical landmines. It seems that “remote” (“WFH”) will be the new normal. This session will give an opportunity to reflect on some of potential ethical problems and an opportunity to see how our colleagues are finding solutions.

Two Education Credit for CLE (ETHICS-PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.

Speakers:

- Richard Bell, Planning Capital Management
- Matt Gaughan, Edward Jones
- Glenn A. Henkel, Esq., Kulzer & DiPadova, P.A.
- Linda Callahan Henry, Woodleave Wealth Process LLC
- Skip Massengill, Coastal Advisors
- Melinda G. Rath, Glenmede
- Mark Sobel, CPA, JD, LLM, Drucker & Scaccetti
- Nicole Williams, TIAA

Zoom Log-In Information

Log-in information will be sent to all registered attendees the day prior to the program.

We have reviewed several video communications services and have chosen Zoom for this event. Unfortunately, not all firms permit the use of Zoom so if you are prevented from using it to attend this event due to company restrictions, please join us using a personal computer or cellular phone or by simply dialing in and listening to the event from a telephone. If you will be using a personal device, please test your connection early; an app or registration may be needed the first time Zoom is used.

The Philadelphia Estate Planning Council does not render any legal, accounting or other professional services. The Council's programs and publications are designed solely to help professionals maintain their professional competence. In dealing with specific matters, the individual using any publication obtained through the Council or any information orally conveyed by speakers at programs sponsored by the Council or in materials distributed by the Council should research original sources of authority independently.

JUNE 15, 2021 VIRTUAL ETHICS FORUM REGISTRATION FORM

*As a special member benefit during the pandemic, current PEPC members will receive complimentary registration to our June 15, 2021 virtual ethics forum.
Continuing education credits not included.*

Luncheon Program Fee:

PEPC Members	\$0	Non-Members	\$25
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Additional Fees:

CLE Credit (Members)	\$20	CLE Credit (Non-Members)	\$20
Insurance Credit (Members)	\$20	Insurance Credit (Non-Members)	\$20
CFP® Credit (Members)	\$20	CFP® Credit (Non-Members)	\$20

No-shows will be billed. No refunds after June 14, 2021.

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

CONTINUING EDUCATION INFORMATION:

Fee: \$20 for CE Credits (2 credits offered)

Continuing Legal Education (2 ETHICS credits).....Attorney ID: _____

Insurance Continuing Education (2 credits).....License Number: _____

CFP® Continuing Education (2 credits)..... Last 4 Digits of SSN: _____

CTFA, PACE and CPA Certificates will be emailed to attendees after the webinar 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. **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

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