



# Baltimore Estate Planning Council

## NAEPC Offers Administered Designations

The **Accredited Estate Planner® (AEP®)** designation is available to attorneys, Chartered Life Underwriters, Certified Public Accountants, Certified Trust and Financial Advisors, Chartered Financial Consultants, and Certified Financial Planners® and is awarded to professionals who meet stringent experience and education qualifications including two graduate level courses administered by The American College. This designation program has grown steadily since its inception, averages 5% growth per year is on target to exceed that percentage for 2009! We're also proud to report that the AEP® designation program is truly multi-disciplinary. 22% of our active designees are attorneys, 29% are in the financial planning arena (CFP® or ChFC designees), 31% are primarily insurance professionals, 13% are CPAs and 5% are CTFA designees (facts current as of January 1, 2008).

The **Estate Planning Law Specialist (EPLS)** designation is available to attorneys by the Estate Law Specialist Board, Inc., an attorney-run subsidiary of the National Association of Estate Planners & Councils. Attorneys who become Board-certified under this program demonstrate a high level of professionalism and commitment to the concept of specialization. We believe that as attorney specialization increases, it will benefit not only lawyers but the public. This program is currently the only program, other than certain state bar association programs which are only for residents of their particular states, accredited by the American Bar Association to Board-certify attorneys as Estate Planning Law Specialists.

For more information, see the NAEPC website: [www.naepc.org](http://www.naepc.org)

### OFFICERS FOR THE FISCAL YEAR 2009-2010

**PRESIDENT**  
LAWRENCE J. MACKLIN, CPA, Esq.  
U.S. Trust, Bank of America Private  
Wealth Management

**PRESIDENT-ELECT**  
DAVID A. GOLDNER, CPA  
Gross, Mendelsohn & Associates, P.A.

**VICE PRESIDENT**  
MICHAEL I. FRIEDMAN  
The Associated Jewish Community  
Federation of Baltimore

**SECRETARY**  
PATRICK J. MONAGHAN, CLU, ChFC  
Monaghan, Tilghman & Hoyle, Inc.

**TREASURER**  
JOHN P. EDGAR, Esq.  
Ober Kaler

### DIRECTORS FOR THE FISCAL YEAR 2009-2010

JOANNE ABELL STANISZEWSKI  
Wilmington Trust FSB

JOHN BARRY, Esq., CPA/ABV  
John B. Barry, LLC

ROBERT J. BAUMMER, CPA  
RSM McGladrey

THOMAS M. BROWN  
Joseph Klein Associates, LLC

NANCY T. BRYANT, CFP  
Bryant Financial Advisory, Inc.

JAMIE W. CAPLIS  
Enoch Pratt Free Library

ROSE L. COOPER  
Wachovia Bank, N.A.

DAVID C. DEMBERT  
Jacobs & Dembert, PA

EDWIN G. FEE, JR.  
Whiteford, Taylor & Preston

YALE M. GINSBURG, Esq.  
Adelberg, Rudow, Dorf & Hendlar

CHARLES B. JONES  
Thomas & Libowitz, PA

R. CHRISTOPHER ROSENTHAL  
Ellin & Tucker, Chartered

BARBARA S. SOTH  
PNC Wealth Management

PAUL TABER, CPA/PPS, CFP  
Taber Financial Services, LLC

IMMEDIATE PAST PRESIDENT  
SHELDON S. SATISKY, Esq.  
Saul Ewing LLP

EXECUTIVE DIRECTOR  
Anna M. Leonhardt

## David Goldner Named Managing Partner at Gross Mendelsohn & Associates



David A. Goldner, CPA, CFP, CVA, was named managing partner of Gross, Mendelsohn & Associates, P.A., a full-service CPA and business consulting firm based in Baltimore.

Goldner steps into the role held by Lawrence E. McCanna, CPA, since 1980. McCanna says of his successor, "One of David Goldner's biggest strengths is his ability to make creative, sound business decisions. He has served for many years on the firm's executive committee and will provide the firm and its clients with a seamless transition to the next generation of leaders."

Goldner has been with Gross Mendelsohn since 1982. As the firm's new managing partner, Goldner says, "I hope to implement a number of new strategies to capitalize on the firm's deep service offerings as we continue to raise our position as one of the leading independent locally-owned and managed CPA firms in the Baltimore region."

This change is significant because it represents the firm's transition from its first generation of leadership to its next generation. Founded in 1960, the firm is approaching its 50th year of doing business in Maryland. Goldner says, "I plan to continue the rich history of providing the highest quality service as we continue to grow during our second 50 years."

Goldner's areas of specialization include tax and financial planning, business valuation and investment planning. In addition to being a CPA, Goldner is a Certified Financial Planner, a Certified Mutual Fund Specialist and a Certified Valuation Analyst. He graduated from the University of Maryland in 1979 with a bachelor's degree in accounting, and received a master's degree in taxation from the University of Baltimore in 1983. He serves on the is currently President-Elect of the Baltimore Estate Planning Council. In addition, Goldner serves on the investment committees of the Susan G Komen Foundation of Maryland and Big Brothers Big Sisters of Central Maryland.

**BEPC GOLD SPONSORS**



Bank of America Private Wealth Management



**Silver Sponsors**

*Adelberg, Rudow, Dorf & Hendler, LLC*

*The ASSOCIATED Jewish Community Foundation*

*Belman Klein Associates, LTD*

*Brotman Financial Group, Inc.*

*Ellin & Tucker Chartered*

*Gross, Mendelsohn & Associates, P.A.*

*Jacobs & Dembert PA*

*Tucker & Meltzer Valuation Advisors*

**For Information about Sponsorship for 2010-2011**

Contact BEPC Headquarters  
410-465-7011  
becp@rxassociationmgt.com

**MEMBERS ON THE MOVE**

**David Sloper promoted to Executive Vice President at First Financial Resources**

Jay M. Weinstein, CEO of First Financial Resources is pleased to announce the promotion of David K. Sloper, Jr, CFP to Executive Vice President of the firm. David earned his CFP in 2001 and is an active member of the Financial Planning Association of Maryland and the Baltimore Estate Planning Council.

He resides in Howard County with his wife and four children.

**L. Content McLaughlin Named One of Maryland's Top 100 Women in 2009**

L. Content McLaughlin, a partner at Tydings & Rosenberg LLP, has been named to Maryland's Top 100 Women in 2009. The award recognizes one hundred of Maryland's leading women who are making an impact on our state through their outstanding achievements. These women will be honored at an awards reception on May 11, 2009.

Ms. McLaughlin is a partner in the Corporate, Business and Tax, and Estates and Trusts Departments. Ms. McLaughlin's practice includes assisting businesses in handling their extraordinary and day-to-day legal problems, and advising clients with complex planning and transfer of wealth issues.

*To include your member news in future issues of the BEPC Newsletter, send it to [becp@rxassociationmgt.com](mailto:becp@rxassociationmgt.com)*

**REMAINING BEPC PROGRAMS FOR 2009-10**

Thursday December 3, 2009 Location: Hilton Pikesville  
**Top 30 Insurance Planning Mistakes**  
*Featuring:* Lawrence Brody Sponsored by: Wilmington Trust

Thursday January 7, 2010 Location: Crowne Plaza Baltimore  
**Estate Planning Update** *Featuring:* Jeffrey Pennell  
Sponsored by: Legg Mason Investment Trust

Tuesday February 25, 2010 Location: Crowne Plaza Baltimore  
**Annual Economic Update** *Featuring:* Anirban Basu  
Sponsored by Wachovia - A Wells Fargo Company

Thursday May 6, 2010 Location: Crowne Plaza Baltimore  
**Charitable Update** *Featuring:* Larry Katzenstein  
Sponsored by: PNC Bank

**In order to keep your BEPC membership in good standing, member must attend two or more educational programs during each BEPC year.**

**Baltimore Estate Planning Council**  
8480M Baltimore National Pike, #242  
Ellicott City, MD 21043  
Phone: 410-465-7011  
Fax: 410-465-7073  
E-mail: [becp@rxassociationmgt.com](mailto:becp@rxassociationmgt.com)  
Website: [www.baltimoreepc.org](http://www.baltimoreepc.org)