Volume 2, Issue 2 Winter 2011

Baltimore Estate Planning Council

Profiles on Upcoming BEPC Speakers

Tuesday March 22, 2011
Practicing Ethically
***with* MARIANNE JENNINGS**

Professor Marianne Jennings is a member of the Department of Management in the W. P. Carey School of Business at Arizona State University and is a professor of legal and ethical studies in business. At ASU she teaches graduate courses

At ASU she teaches graduate courses in the MBA program in business ethics and the legal environment of business. She served as director of the Joan and David Lincoln Center for Applied Ethics from 1995-1999. From 2006-2007, she served as the faculty director for the MBA Executive Program. Professor Jennings earned her undergraduate degree in finance and her J. D. from Brigham Young University

Professor Jennings has authored hundreds of articles in academic, professional and trade journals. Currently she has six textbooks and monographs in circulation.

Tuesday May 17, 2011
Charitable Program
***with* Christopher Hoyt**

Christopher R. Hoyt is a Professor of Law at the University of Missouri-Kansas City School of Law. Previously, he was with the law firm of Spencer, Fane, Britt & Browne in Kansas City, Missouri. He received an undergraduate degree in economics from Northwestern University and received dual law and accounting degrees from the University of Wisconsin. He is a frequent speaker at legal and educational programs and has been quoted in numerous publications. He attained membership in the Order of the Coif and received three American Jurisprudence Awards for achievements in specific classes.

He is currently the Chair of the American Bar Association's Committee on Lifetime and Testamentary Charitable Gift Planning (Section of Probate and Trust) and serves on the editorial board of Trusts and Estates The Wall Street Journal, Forbes, MONEY Magazine and The Washington Post.

SNOW PLAYS HAVOC WITH BEPC O'GRADY BREAKFAST

The January 27th Annual Tax Update program presented by John O'Grady was held despite the inclement weather. Approximately 30 individuals turned out and enjoyed the program. John O'Grady managed to travel from Richmond, Virginia on Wednesday evening. We appreciate his commitment to making a real effort to make his presentation.

BEPC has offered registrants unable to attend due to the weather conditions a chance to defer their registration that day to the February 22nd, March 22nd or May 17th breakfasts. being available to deliver the program to BEPC. Mr. O'Grady's program handout is also available in the Document section of the BEPC website (www.baltimoreepc.org).

The BEPC Board is now negotiating with Mr. O'Grady present a similar program at the **BEPC ANNUAL MEETING** scheduled for Thursday June 2, 2011. This year's annual meeting will include an educational program in addition to the usual business meeting and reception. Details on this early event will be available by April 1st.

PLAN FOR NATIONAL ESTATE PLANNING AWARENESS WEEK - OCTOBER 17-23, 2011

National Estate Planning Awareness Week is October 17-23. On the website there educational materials to use if you or your firm plan on participating in this event. Please go to the website for more information at www.naepc.org.

It's worth spending time visiting the NAEPC website. It has quite a lot of information that can be helpful to the beginner and the advanced estate planner. There's a link called "Estate Planning Answers" that you might find quite informative and helpful covering such topics as financial wellness, retirement and elder law.

MEMBERS ON THE MOVE

Nancy Bryant, CFP® and current BEPC Board member, formerly of Bryant Financial Advisory, Inc. has merged her practice with Greenspring Wealth Management, a fee-only comprehensive financial planning and investment advisory firm located in Towson, Maryland.

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2010-11 BEPC COMMITTEE UPDATES

Membership Committee
Chair, Jack Edgar

The Council has a total of 319 Members as of February 2011. There are still approximately 83 open membership slots available among the various disciplines. The following new members have joined BEPC since the first of the year:

Shelley Keirn - CPA
Stoy, Malone and Company
Christopher K. Kyanko - CPA
Heim Lantz, PA - CPA
David M. Lanchak - CPA
Gross, Mendelsohn & Assoc
James Palermo - QFA
PNC Wealth Management
Robert C. Peithman - TO
PNC Bank
Michelle Roberts - QFA
Brotman Financial Group, Inc.
Laurence Seiden - QFA
PSA Insurance & Financial Services

75th Anniversary Committee
Chair, Larry Macklin

The Committee is circulating a Survey among the BEPC membership to determine the types of events to be held in recognition of this great milestone. Please complete the Survey and return as soon as possible.

Sponsors Committee
Chair, Michael Friedman

Gold and Silver Sponsors for the 2011-2012 Programs are still to be determined. If your organization has any interest in becoming a sponsor, please contact Michael Friedman or the BEPC office.

Ethics Committee
Chair, Jeff Glaser

This Committee is still in its early formation stage. Development of the major ethical issues facing the various disciplines within our organization is at the forefront.

Newsletter/Public Relations Committee
Chair, Nancy Bryant

The Committee is working hard to publish at least three newsletters throughout the membership year. The Committee is looking for information from its membership regarding change in company affiliation, change of location, etc. The Committee is also exploring ways to reach out to a wider audience to bring awareness to BEPC and the benefits of membership.

Program Committee
Chair, Pat Monaghan

The Committee has developed the 2011-2012 slate of programs and speakers, as follows:

September 22, 2011
Life Insurance - Larry Brody
October 25, 2011
Estate Planning - Stacy Eastland
November 29, 2011
Current Developments
Steve Akers
January 24, 2012
Family Business Consulting
Gerald Le Van
March 1, 2012
Economic Update
Anirban Basu
May 8, 2012
Charitable Planning
Kathryn Miree

UPCOMING EVENTS *for the*
Financial Planning Association
FPA Business Solutions 2011
Cambridge, Massachusetts
March 3-5, 2011.

FPA Retreat 2011
Bonita Springs, Florida
May 3-6, 2011

FPA Experience
2011 Annual Conference
San Diego, California
September 15-18, 2011

Go to www.fpanet.org for registration and program information.