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Baltimore Estate Planning Council

Leimberg Information Services (LISI) - Remains BEPC Top Member Benefit

LISI is a premier estate planning website which is **included in your BEPC membership** to the Baltimore Estate Planning Council. The website, www.leimbergservices.com, contains a wide variety of information, including incisive and easily accessible analysis and commentary on proposed and recent legislation, regulations, rulings, and cases. The database is easily searched and contains hundreds of these commentaries, as well as the actual text of the laws and decisions . You will also find useful tax tables, 7520 and AFP rates, financial calculators and a resource area for corporate and partnership entities. We have received very positive feedback from those of our members who have started using the site, and we encourage you to try it and let us know what you think.

Accessing the Website: In order to access the site, you must obtain a username and password by doing the following:

Go to:

http://leimbergservices.com/naepc_access.cfm

- Do NOT enter anything into the "username" or "password" area on the left of the HOME page on this visit.
- At the top center of the Leimberg home page, you will see: ESTATE PLANNING COUNCIL MEMBER, CLICK HERE TO OBTAIN USERNAME AND PASSWORD.
- After clicking there, a form will open for you to complete and submit. Once you completed the form, you will receive an e-mail with your username and password.
- You can then use this username and password to access the website.

Please check the BEPC website: www.baltimoreepc.org or the National website: www.naepc.org for more information on member services

Expansion of Qualified Financial Advisors Member Category Approved by BEPC Membership

At the June 2008 annual meeting the BEPC membership approved a by-laws change expanding the definition of qualified financial advisor to include other financial professionals which could include individuals working as investment advisors (ex: a relationship manager at an investment advisory firm) and business valuation professionals (who are for example an ASA) assuming that these individuals do substantial work in estate planning.

Many of these individuals do not have a specific credential that the BEPC could look to as certification of education and activity in estate planning related topics. Because of this, these potential members are subject to a more stringent requirement for membership.

These QFA candidates complete an expanded application section which includes the following:

- Proof of professional licenses and certifications obtained
- List of professional associations active in
- Current job position and title
- Number of years providing Estate planning services – a minimum of 5 years experience would be required
- How the services you provide relate to estate planning

In addition, these candidates need to obtain three recommendations at least two of which must not be connected professionally with the firm with which the applicant is then associated.

The entire application must be approved by the membership committee chair and at least two other officers of the BEPC

The amended application is now available through BEPC Headquarters or on-line at: www.baltimoreepc.org.

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For Information about Sponsorship for 2009-2010

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MEMBERS ON THE MOVE

ABOSCH JOINS SILBERSTEIN INSURANCE GROUP

Jason Abosch has joined Silberstein Insurance Group (SIG) as an Associate.

"Jason brings a skill set that will add to the depth and breadth of SIG and our capabilities," says Richard Silberstein, President of Silberstein Insurance Group.

Abosch holds a BA in accounting from Towson University and an MBA. from the University of Baltimore, in addition to the CFP and CPA designations.

OBER/KALER ADDS JOHN EDGAR TO ESTATES & TRUSTS PRACTICE

Baltimore based law firm Ober/Kaler announced that John Edgar has joined the firm's Estates & Trusts Group. Mr Edgar's legal practice focuses on estate and trust planning and administration, as well as related tax and business planning issues.

Prior to joining Ober/Kaler, Mr. Edgar served as the Managing Director of the Trust Advisory Group at Legg Mason Investment Council & Trust Company, where he supervised the corporate trustee.

Mr. Edgar currently chairs the Estate and Trust Law Section of the Maryland State Bar Association. He is also serves as a Board member of BEPC.

To include your member news in future issues of the BEPC Newsletter, send it to bepc@rxassociationmgt.com

MARK YOUR CALENDARS - BEPC 2009-10 PROGRAMMING

2009		
September 22	Discretionary Trusts	Susan Porter
October 27	IRA Related Numbers	Robert Keebler
December 3	Top 30 Insurance Planning Mistakes	Lawrence Brody
2010		
January	Estate Planning Update	Jeff Pennell
February	Economic Update	Anirban Basu
May 6	Charitable Topic	Larry Katzenstein

Schedule as of May 1, 2009. Any adjustments to the schedule as well as details regarding specific times and location will be posted at e www.baltimoreepc.org.

FINAL BEPC EVENT OF THE 2008-09 YEAR
Wednesday June 4, 2009 - 4:45 pm

Annual Business Meeting & Reception
Chestnut Ridge Country Club
11700 Falls Road
Lutherville, MD 21093

No cost to attend, please RSVP by contacting BEPC Headquarters.