

## Dear Members and Guests,

The Chicago Estate Planning Council (CEPC) is a multi-disciplinary organization that supports the team concept of estate and wealth planning. Founded in 1938, CEPC is one of the oldest and largest such estate planning councils in the country, boasting almost 700 members this year. With the recognition that estate planning is a cooperative task, the Council started as, and continues to be, a carefully selected group of qualified specialists in their own fields who have the necessary knowledge and experience to accomplish the broad goal of estate planning for the best interest of the client and his or her beneficiaries. Our members include attorneys, accountants, trust officers, wealth managers and advisors, financial planners, insurance agents, appraisers, planned giving specialists and other allied professionals.

The primary objectives of the Council are to: i) foster a better understanding of the proper relationship among estate planning specialists from different disciplines and to bring those specialists together in one association; ii) further the education of members and the public in matters of estate planning; and, iii) encourage the highest standards of professional and ethical conduct.

We have planned an ambitious series of events for this year, each designed to support the Council's mission and to appeal to its broad and varied membership. We invite you to review the calendar and sign up for events online.

For those of you who may be new to CEPC, we have posted information about CEPC's mission and history as well as membership criteria and application procedure on the website. We look forward to seeing you at all of our events.

Regards,

Todd J. Schneider, CEPC President

### In keeping with our primary objectives, CEPC offers:

- Monthly luncheon programs on current estate planning topics by prominent local and national speakers designed to support the Council's mission and to appeal to its broad and varied membership. We invite you to review the calendar and sign up for events online.
- CLE, Insurance, CPA and CFP® continuing education credit, including ethics
- Periodic seminars specifically tailored to enhance the knowledge base of members with fewer than 10 years of estate planning experience
- Basics Course offered to members and their associates with less than two years estate planning experience
- Free Webinars to discuss current events and special interests
- Quarterly Networking Events
- Annual Outing and Member Evening Events