



GREATER MIDDLESEX/SOMERSET ESTATE PLANNING COUNCIL

OFFICERS:

Jill Lebowitz, Esq.
PRESIDENT

David Bobrowsky, CFP
VICE PRESIDENT

Andrew Novick, CFP
TREASURER

Jayne C. Kredatus
SECRETARY

Eliot M. Goldstein, Esq.
PAST PRESIDENT

TRUSTEES:

David Bobrowsky, CFP
Mark H. Chazin, Esq.
Michael K. Feinberg, Esq.
Eliot Goldstein, Esq.
Mary Ellen Hancock, CFP
Jayne C. Kredatus
Jill Lebowitz, Esq.
John G. Manfreda, Esq.
Jack Meola, CPA JD LLM
Lisa A. Morrison, CFP
Andrew Novick, Esq., CFP
Ralph Winter, CPA

August 18, 2016

Dear Estate Planning Colleague:

The Officers and Trustees of the Greater Middlesex/Somerset Estate Planning Council welcome you to the upcoming 2016-2017 Membership Year. We are excited about the coming year and our Board has worked diligently this Summer to provide a line-up of cutting edge programs and quality speakers. Membership in the Council offers you access to seminars that provide timely, valuable information integral to your practice in the estate planning field, as well as the opportunity to network with your peers in an enjoyable, professional setting. As an additional benefit, our Council is qualified as a Sponsor, which enables our programs to qualify for CLE, CTFA, CFP, and CPE credits for those in attendance. **Once again, we will be offering free CLE for all of our programs.**

We will continue to hold all of our meetings at Fiddler's Elbow Country Club located just off Exit 26 on Rt. 78 near Bedminster. Our 2016-2017 Program Schedule will include three (3) dinner meetings and three (3) breakfast meetings. Breakfast is served at 7:45 AM, followed by the speaker presentation at 8:15 AM. Dinner meetings begin at 5:30 PM with a cocktail hour that runs until 6:00 PM and includes one free beer or wine. Each dinner meeting will open at 6:00 PM with a spotlight presentation, and dinner will be served at 6:15 PM. The main program will begin at 7:00 PM. The following is our program lineup for 2016-2017:

- (1) Thursday, September 15, 2016 - Dinner Meeting
Location: Fiddler's Elbow Country Club
Speaker: Gerard G. Brew, Esq. (McCarter & English, LLP)
Program: New Jersey Uniform Trust Code – The New Legislation and Your Practice
- (2) Wednesday, October 26, 2016 – Dinner Meeting
Location: Fiddler's Elbow Country Club
Speaker: Andrew DeMaio, Esq. (Neff Aguilar, LLC)
Program: Planning For Digital Assets
- (3) Thursday, December 1, 2016 – Breakfast Meeting
Location: Fiddler's Elbow Country Club
Speaker: Anita J. Siegel, Esq. (Siegel & Bergman, LLC)
Program: Charitable Planning in the Current Tax and Economic Environment

- (4) Thursday, January 26, 2016 – Dinner Meeting
Location: Fiddler’s Elbow Country Club
Speaker: Richard H. Greenberg, Esq. (Greenberg & Schulman)
Program: Heckerling Institute Estate and Gift Tax Update

- (5) Thursday, March 16, 2017 – Breakfast Meeting
Location: Fiddler’s Elbow Country Club
Speaker: Tom Georges (Stan Johnson Company)
Program: Section 1031 Exchanges - Beyond Net Lease

- (6) Thursday, May 11, 2017 – Breakfast Meeting
Location: Fiddler’s Elbow Country Club
Speaker: Lance S. Hall, ASA (FMV Opinions, Inc.)
Program: Estate and Gift Tax Valuations Update

The dues structure will be the following for the upcoming program year:

(A) Individual Members will pay \$325.00 for the entire year, which includes the annual membership dues and meal charges for all six (6) meetings.

(B) Corporate Members will pay \$625.00 for the entire year, which includes the annual membership dues for all members of that organization, plus meal charges for up to three persons belonging to that organization who wish to attend each of the six (6) meetings. Additional persons employed by the same organization are welcome to attend all of our six meetings at a reduced member rate of \$75.00 per person per meeting.

(C) Non-member/guest attendance rates are \$85.00 per meeting.

You may apply for membership either on our website or by using the enclosed Membership Application for 2016-2017. Your dues payment should be forwarded to our Secretary, Jayne C. Kredatus, at 16 Stapleton Court, Bridgewater, NJ 08807 via regular mail. We look forward to having you join us and participate in the meetings.

Please visit our website – www.gmscepc.com.

All attendees are required to “sign in” at every meeting. An attendance sheet will be made available for this purpose. This is required of all attendees, regardless of whether or not professional credits are sought for a particular meeting.

It is an honor for me to serve as your Board President for the 2016-2017 Year. On behalf of our Board, I look forward to seeing you at our meetings throughout the year. Thank you for your continued support of the Council.

Sincerely,

Jill Lebowitz, Esq.
Board President 2016-2017