



GREATER MIDDLESEX/SOMERSET ESTATE PLANNING COUNCIL

August 19, 2022

Dear Estate Planning Colleague:

The Officers and Trustees of the Council welcome you to the 2022-2023 membership year. We are looking forward to a year filled with meeting new colleagues, increasing our membership and providing terrific speakers and topics.

OFFICERS:

Debra Schatzki,
CFP®, CLU®, AEP®
PRESIDENT

Daniel S. Makoski, Esq.
VICE PRESIDENT

Mary Ellen Hancock, CFP®
TREASURER

Jayne C. Kredatus, CTFA
SECRETARY

Abbey M Horwitz, Esq.
ADMINISTRATIVE SECRETARY

Lisa Morrison,
CFP®, CRPC®, CPFA®
PAST PRESIDENT

As your current President of the Greater Middlesex/Somerset Estate Planning Council, my hope is to have us all enjoy in-person meetings once again with some exciting speakers and topics. The Officers and Trustees have worked non-stop to prepare broad educational programs and networking opportunities.

We have secured speakers to present relevant and enlightening topics. **Our first networking event will be held on Sept 15th, 2022 at the Seasons 52 in Edison, NJ, featuring Russel J. Fishkind, Esq.** He specializes in the Personal Wealth, Estates and Trusts Practice, focusing on high-net-worth estate planning, business succession planning, family office consulting, estate administration and probate litigation. His topic will be ***Probate Wars: The Symbols of Prince***. The meeting will begin at 5:00pm and will include an hour of cocktails (complimentary beer/wine/nonalcoholic beverages) and hors d'oeuvres, with dinner and Russell's presentation to follow. *We encourage you to bring any friends or colleagues.* **Space is limited so please RSVP immediately.**

Our Council is qualified as a Sponsor, which enables our programs to qualify for CLE, CTFA, CFP, and CPA credits for those in attendance.

TRUSTEES:

Debra Schatzki,
CFP®, CLU®, AEP®
Daniel S. Makoski, Esq.
David A. Bobrowsky, CFP®
Mark H. Chazin, Esq. LLM
Kelli M. Christensen, CTFA
Michael K. Feinberg, Esq.
Eliot Goldstein, Esq.
Mary Ellen Hancock, CFP®
Jayne C. Kredatus, CTFA
Jill Lebowitz, Esq., LLM
Jack Meola, CPA, JD, LLM, TEP
Lisa A. Morrison, CFP®
Andrew Novick, Esq., CFP®
Ralph Winter, CPA
Abbey M Horwitz, Esq.

Membership in the Council offers you an array of benefits; continuing education credits, networking opportunities with a diverse group of professionals, and access to seminars providing timely, valuable information integral to your practice so you are up to date with all that is going on in your field and those adjacent to your line of work.

Our 2022 – 2023 program schedule will include six (6) meetings: four (4) dinner meetings and two (2) breakfast meetings to be held at Fiddler's Elbow Country Club in Bedminster, NJ, with the exception of our first networking event being held at Season's 52 in Edison, NJ.

Breakfast meetings begin 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 6:15 PM and includes one complimentary beer or wine. Dinner will be served at 6:15 PM and the main program will begin.

We are looking forward to seeing our returning members as well as some new faces at our September 15th networking event.

The following is our program lineup for 2022-2023:

- September 15, 2022 – Dinner Meeting 5:00pm held at Season’s 52, Edison, NJ,
Speaker: Russel J. Fishkind, Esq.
Topic: Probate Wars: The Symbols of Prince
- Wednesday, October 19, 2022 – Breakfast Meeting 7:45am held at Fiddler’s
Speaker: Frazer Rice, JD
Topic: Emerging Issues with Crypto, NFTs and Estate Planning
- Tuesday, November 29th, 2022– Dinner Meeting 5:30pm held at Fiddler’s
Speaker: Leonard J. Witman, Esq.
Topic: Secure Act 2.0 and Retirement Planning Strategies
- Thursday, January 26, 2023 – Dinner Meeting 5:30pm held at Fiddler’s
Speaker: Richard H. Greenberg, Esq.
Program: Heckerling Institute Update
- Thursday, March 9, 2023 – Breakfast Meeting 7:45am held at Fiddler’s
Speaker: Anita J. Siegel, Esq.
Program: Ethics
- Tuesday, May 2, 2023 – Dinner Meeting, 5:30pm held at Fiddler’s
Speaker: Martin M. Shenkman, Esq.
Program: Multi-Generational Insurance Planning

Before each meeting you will receive an email with the scheduled meetings which will require an RSVP. Please make note of these dates on your calendars so you don’t miss out.

We have maintained the dues’ structure for the upcoming year.

(A) Individual Members will pay \$350.00 for the entire year, which includes the annual membership dues and meal charges for all six (6) meetings.

(B) Corporate Members will pay \$675.00 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 attached Membership Application for 2022 - 2023. Please return the completed application along with your business card so we have your correct title and designations. Payments 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 and assisting us in expanding our membership as we believe there are many people that can benefit from the educationally rich and enjoyable presentations that our speakers will undoubtedly provide.

Please visit our website – www.gmscepc.org for all of our information and updates. 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.

Additionally, we welcome Dinner and Breakfast Sponsors for both members and non-member firms. See our attached Sponsor Guidelines. Please contact me directly to discuss any sponsorship opportunities.

It is an honor and a privilege to serve as your Board President, I look forward to working with all of you to make our Council a meaningful group to be a member of.

On behalf of our Board, we look forward to seeing old and new friends at our meetings throughout the year.

Thank you for your continued support of the Council and most importantly, be safe and healthy.

With Gratitude,

Debra Schatzki, CFP®, CLU, AEP, Board President 2022-2023