



GREATER MIDDLESEX/SOMERSET ESTATE PLANNING COUNCIL

November 5, 2024

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The Officers and Trustees of the Council welcome you to the 2024-2025 membership year. We are looking forward to a year filled with meeting new colleagues, providing terrific speakers and topics, and enjoying some meaningful networking events as well.

As your President, my hope is for you to enjoy our meetings. We have an excellent line-up of speakers and topics. The Officers and Trustees have worked hard to prepare broad educational programs and networking opportunities.

Our first dinner meeting will be held on Sept 19, 2024, at Fiddlers' Elbow, featuring Deirdre Wheatley-Liss, Esq. Ms. Wheatley-Liss specializes in Estate Planning with Closely Held Businesses & Wealth Consulting. Her topic will be the Corporate Transparency Act: Law and Compliance. The meeting will begin at 5:30pm and will include a pre-meeting time to network with dinner to follow.

Our Council is a qualified Sponsor of continuing education for our members, so our programs qualify for NJCLE, CTFA, CFP, and CPA credits for those in attendance.

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 2024 – 2025 program schedule will include six (6) meetings: four (4) dinner meetings and two (2) breakfast meetings.

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. Dinner will be served at 6:15 PM and the main program will begin.

We are looking forward to seeing all our members and their guests at our September 19th meeting. **For this meeting ONLY we are inviting all guests to join us as our guests at no cost!**



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The following is our program lineup for 2024-2025:

- Thursday, **September 19, 2024** – Dinner Meeting 5:30pm held at Fiddler's Elbow Country Club
 - Speaker: Deirdre R. Wheatley-Liss, Esq., LL.M, CELA
 - Topic: Corporate Transparency Act: Law and Compliance.
- Thursday, **October 17, 2024** – Cancelled
- Tuesday, **November 19, 2024** - Dinner Meeting 5:30pm held at Fiddler's Elbow Country Club
 - Speaker: Craig M. Aronow, Esq. & Rachel E. Holt, Esq.
 - Topic: Nuts and Bolts of Wrongful Death and Personal Injury
- Thursday, **January 30, 2025** – Dinner Meeting 5:30pm held at Fiddler's Elbow Country Club
 - Speaker: Mark R. Parthemer, Esq., AEP, ACTEC Fellow
 - Program: 2025 Heckerling Review!
- Thursday, **March 6, 2025** – Breakfast Meeting 7:45am held at Fiddler's Elbow Country Club
 - Speaker: Isabel Miranda, Esq., TEP
 - Program: Estate Planning: Money and Meaning
- Thursday, **May 1, 2025** – Dinner Meeting, 5:30pm held at Fiddler's Elbow Country Club
 - Speaker: Lisa Goldman, CPA, M. TAX, TEP, STEP
 - Program: Multi-National Estate Planning

We are planning a networking event for the Spring of 2025. Details to follow.

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

Our 2024-2025 dues structure for the year is as follows:

(A) Individual Members will pay \$375.00 for the entire year, which includes the annual membership dues and meal charges for all six (6) meetings.

(B) Corporate Members will pay \$750.00 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 people employed by the same organization are welcome to attend all of our six meetings at a guest rate of \$85.00 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 2024 - 2025. 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 or by paying online using PayPal. 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 our information and updates and follow our council on LinkedIn.

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 Sponsorships and I’m thrilled to say that we had our most sponsors last year, thank you. We now offer Gold, Silver and Bronze sponsorships 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, stay safe and healthy.

With Gratitude,

Daniel S. Makoski, Esq., LL.M,
Board President 2024-2026