MEMBERS!

WE ARE HAVING A

MEMBERSHIP DRIVE!

For our   January   meeting,

featuring The Honorable Glen M. Reiser (retired) as our speaker,

**your guest is FREE .**

(normally $60)

**Please bring a guest!**

***Please see below for important details.***

**Requirements to Bring a Free Guest on January 8, 2020**

The Honorable Glen M. Reiser (retired) is scheduled to speak on the topic “Family Law and Probate Cross-Overs” on January 8, 2020. In order for your guest to attend free of charge that evening, the following rules will apply:

1. The guest **must be someone who would likely qualify as a prospective member**, which basically means a professional whose practice is substantially focused on estate and/or tax planning and is a member in good standing of one of the following groups: (i) attorney; (ii) certified public accountant or enrolled agent; (iii) trust officer; (iv) certified financial planner; (v) chartered life underwriter; (vi) chartered financial consultant; (vii) or a director, officer or manager (or its equivalent) of a business or organization that performs estate related services such as trust and estate administration, wealth management or planned giving.
2. You **MUST RSVP to Tom Eisenstadt at tom.eisenstadt@stifel.com** or you will be charged the regular guest fee of $60.00. Please send Tom your name, your guest’s name and your contact information in the email.

**Change to General Policy for Paying Guests**

In addition to the above, any paying guest may now attend two times per term, as opposed to the previous policy allowing any guest to attend only once per term. Please note, attendance at the January meeting described above (even though free) will count as one of the two allowed attendances per term.

Regards,

WHT&EPC BOARD OF DIRECTORS

Maureen B. Isaacson, President