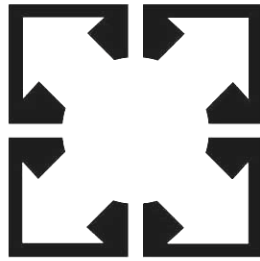


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Central  
Arizona  
Estate  
Planning  
Council

2013/2014 Season	Officers
Emily Burns	President
Steve Taddie	Vice President
David Walser	Treasurer
Darlene Hagan	Secretary
Joseph McCabe III	Past President

2013/2014 August Issue

Newsletter Date: August 6, 2013

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## Membership Renewals and Outreach: Why Join? Why Renew?

### Networking

Your membership fee brings you into monthly contact with more than 200 experienced professionals. Our membership includes a broad array of estate planning disciplines and backgrounds.

Your membership profile is readily available to every other member through our on-line membership directory.

Your key profile information can be found in the printed roster, historically available every October at our kick-off meeting.

### JOIN BY 9/20 to be included in the printed roster

### Dinner, Cocktails, and Continuing Education

Our format, a cocktail networking hour, followed by a full dinner and 1 hour CE, provides opportunities to meet many new professionals, catch up quickly and regularly with existing relationships, gain new knowledge and sources of information for your professional practice situations, and fulfill one hour of CE..

### Great Value

As reported by the membership committee, the value of the meals alone is \$400. The annual subscription to Leimberg Services costs more than \$200 if purchased directly. The 9 hours of CE would generally cost no less than \$625, without including meals and adjusting for nationally ranked presenters. Membership in CAEPC represents at least \$1,225 in benefit value.

### Public Visibility

Seeking ways to market your firm and stand out from the crowd for potential clients and out-of-state referral sources?

Add a logo-specific web-link, connecting to your name and website, in the on-line publicly accessible "Find a Planner" listing - for an additional \$25. Purchase this member benefit on the sponsor page of the website.

*Forward this e-newsletter to a professional who should consider Joining!*

### Showcase Your Firm

Sponsorship support of our programming provides our members with this exceptional value...If you a serious estate planner, you can't afford NOT to join. If you are serious about expanding your branding, visibility, and image as a quality company to the Arizona Estate Planning Community, you can't afford not to consider sponsorship.

### Need More Information?

Contact this year's sponsorship chair, Joe McCabe III, or membership chair, Steve Taddie.

## President's Message: Emily Burns

'She's b-a-a-c-k!' For those of you with long memories, I was president of this group once before, in 1998-1999. Why did I take this job again? Well, I am not good at saying 'no' - and I am glad I didn't. It is my great good fortune to once again lead this wonderful group of professionals through another membership year.

We've decided that this is our 50<sup>th</sup> anniversary year. CAEPC 'began' in the early 60's, best as we can tell. We have a long and proud history.

We have a great Board of Directors this year, with five new members whom we are thrilled to welcome. We look forward to great things from all of them, and

thank them for their time and effort. We encourage all CAEPC members to consider serving on the Board.

We have excellent speakers lined up for the year; most are nationally known. We listened to your comments and suggestions in a January 2013 survey, and are covering many of your top choices for topics.

Read more.....

## Around the Corner: Upcoming Events!

### **Save The Date: First meeting of the 2013/14 season**

Monday Oct. 7, 2013 5:00 PM at the Phoenix Country Club.

Visit the [event posting](#) to the CAEPC website events pages to view presentation details and to register.

Next season's program line up is already in place and posted to the [web-site](#).

Please contact the administrative office, [info@caepec.org](mailto:info@caepec.org), with any questions or assistance needed.

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## THE EPG RETURNS!

The Emerging Professionals' Group (EPG) of Central Arizona Estate Planning Council (CAEPC) is looking forward to its third year. What started off as a small group of ten members of CAEPC has blossomed into a very large group encompassing the future of CAEPC. We are looking forward to another successful season!

As in prior years, the EPG focuses on social and educational events for individuals new to the private wealth planning areas of estate planning, accounting, and financial planning, and acclimating such individuals into CAEPC. Prior events have included happy hour events at the Vig, Del Frisco's, and Christopher's Crush, and educational events held at Phoenix Country Club and the Arizona Community Foundation. (Last year we even went bowling, which I thought was a great idea until I realized that I am terrible at bowling. Nevertheless, it was a fantastic well-attended event.)

The planning committee for the EPG, which still contains many of the original founders of the group.

If you have interest in joining the planning committee of EPG, please feel free to [contact the EPG Chair, Darren Case](#). [Read more.....](#)

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### **“SEEPOMP Scholarship” now becomes the EPG Scholarship-Apply Today!**

In prior years, Central Arizona Estate Planning Council (CAEPC) has offered scholarship memberships to CAEPC through its Student & Emerging Estate Planners Outreach & Membership Program (SEEPOMP). CAEPC will be continuing the SEEPOMP scholarship tradition, but it will now be governed by the Emerging Professionals' Group (EPG) and known as the EPG Scholarship.

As was the case for the SEEPOMP Scholarship, the EPG Scholarship will be awarded to students striving to achieve designations such as JD, CPA, CLU, CFA, CFP or CTFA or young professionals new to the private wealth planning area who have already obtained or are in the process of obtaining the above mentioned designations. This year the EPG is offering up to three memberships for

students or young professionals who will be able to experience our programs and meet our membership. For the 2013-2014 CAEPC season, the EPG is currently seeking any suggestions for highly qualified candidates for these scholarships. If you know of any candidates, please feel free to contact us at [emergingprof@caepec.org](mailto:emergingprof@caepec.org), where we can provide anyone with application materials. This year's **deadline to apply is September 6, 2013.**

This scholarship program has worked as a great incentive for attracting talent to our organization. Last season's scholarship recipients included Kimberlee Handy, Andrew Morrison, and Sarah Giles. We look forward to attracting future talent to CAEPC through the EPG Scholarship Program. for the 2013-2014 season and into the future!

## WELCOME! 2013/14 CAEPC Board of Directors

Emily Burns	President		Harry Calivas	At Large
Steve Taddie	Vice President		Kyle Decker	At Large
David Walser	Treasurer	<i>Thank you for your service and dedication!</i>	Gary Ringel	At Large
Darlene Hagan	Secretary		Liz Shabaker	At Large
Joe I. McCabe III	Past President		Chuck Whetstine	At Large
Darren Case	At Large		Katie Hill	At Large
Steve Koons	At Large		Nick Kolesar	At Large

### Why Serve the Central Arizona Estate Planning Council?

“As a new member, I am honored to be a part of such a respected organization here in Phoenix. I decided to join the board for a few reasons. One such reason was the tremendous resources and help my team and I have received from CAEPC members on numerous client situations. Along those same lines are the learning opportunities we have had via speakers and workshops to continue to better our employees and staff with top of the line education and CE. I wanted to be able to give back in any way that I can to show my organization’s gratitude for the partnership and learning opportunities over the years.”

**Nick Kolesar, CFP®**

**Senior Vice President - Private Client Advisor**

**U.S. Trust, Bank of America Private Wealth Management**

“CAEPC has been a great place to help build my professional network, while learning about specific areas related to estate planning. I find it invaluable to be able to interact with a diverse array of professionals, with similar interests. I have made many friendships and connections along the way and hope to continue this into the future. I applied to be on the Board of CAEPC to give my energy and skills to something I felt was a worthwhile and notable cause. By serving on the Board, I will feel more invested and motivated by helping the Council achieve their goals. I am hoping that I can give back to our group, provide a voice for the younger professionals, make a difference and have an impact. As a Board Member I will be able to broaden my own knowledge, develop better skills all while contributing to the strategic mission of our Council.”

**Elizabeth Shabaker, CFP®, EA**

**Chief Operating Officer and Senior Investment Counselor**

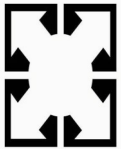
**Versant Capital management, Inc.**

“My interest in serving on the CAEPC board started a year ago as I served on the board of the Emerging Professionals’ Group (EPG). I saw that EPG was effective in educating a large group of planning professionals about the benefit of joining CAEPC. By serving on the Board of CAEPC, I hope to focus on strategies that will increase membership and awareness of our organization. I also look forward to maintaining current member satisfaction by continuing to provide beneficial programs and events. Throughout my years of membership in CAEPC, I have expanded my base of knowledge and professional network. The resources that CAEPC provides have helped me to better serve my clients. I hope to use my term on the board to serve an organization that has had a positive impact on my own professional development.”

**Kyle Decker, CFP®**

**Vice President—Investments**

**Wells Fargo Advisors**



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## Connecting Estate Planners Across the Valley!

The Central Arizona Estate Planning Council was established in the 1960s as a professional organization for diverse practitioners involved in the estate planning process.

With emphasis on the estate planning team, our focus is to gain a broader perspective of pertinent issues and ideas, in order to construct and protect our clients' financial estates and to achieve a smooth transition of wealth from one generation to another.

Estate planning is one of today's fastest-evolving professional disciplines, as ever-changing tax laws and volatile market values have created opportunities for practitioners and clients alike.

The Council regularly presents top national speakers at power-packed dinner meetings offering both continuing education and networking opportunities. Council members further benefit from an afternoon seminar with a national strategist, an ice cream social, a spouses' night and a golf outing - - all designed to promote professionalism and reciprocal associations among the Council professionals.

**Special Mentions: Join us in congratulating Tucker Smith on his AEP® designation award! Well Done!!**

### 2013/2014 CAEPC Committees

**Membership:** Steve Taddie and Bill Purdue

**Sponsorship:** Joseph McCabe III

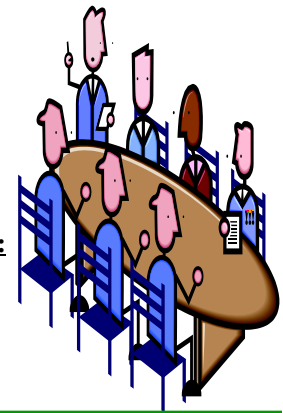
**Emerging Professionals' Group:** Darren Case

**Holiday Event:** Darren Case and the EPG Group

**Interested in getting involved? Committees now forming:**

Membership, Nominating, Legislative Affairs, EPG, Community Outreach, Newsletter, Sponsorship, Golf Event, AEP, Meeting Ambassadors

Email [info@caepc.org](mailto:info@caepc.org) with your interest and a member of the board and/or committee will contact you.



### 2013/2014 CAEPC Sponsors-Thank You For Your Support!



HENRY & HORNE, LLP  
Certified Public Accountants



Bank of America Private Wealth Management



Charles W. Whetstone, PC



2013/14 season sponsorships available. Please visit the [sponsor page](#) of the website.