



CAEPC

CENTRAL ARIZONA ESTATE
PLANNING COUNCIL

2025 - 2026

New Member Welcome Packet



TABLE OF CONTENTS

Letter From Current President.....3

Current Board4

Past Presidents.....5

Current Sponsors Recognition 6

Calendar of Events..... 8

NAEPC Benefits (Award) 9

AEP® Designation..... 12

CAEPC 2024-2025 Sponsorship Commitment 13

Golf Tournament.....16

Holiday Service Project & Mixer..... 17

Half Day Program..... 18

Emerging Leaders Program.....19

Membership Directory (online link only available to members)..... 20

Social Media..... 21

President's Message



Founded in the 1960's, The Central Arizona Estate Planning Council (CAEPC) is a group of approximately 200 professionals working in the greater Phoenix, Arizona area, that specialize in legal, accounting, insurance, investment, trust, and valuation services, as well as representatives from various charitable organizations. CAEPC has been honored as a 5 Star Council by the National Association of Estate Planners & Councils (NAEPC).

The Mission of the CAEPC is to strengthen the estate planning profession in the greater Phoenix area by:

- Providing high quality continuing education
- Sponsoring networking opportunities, and
- Fostering a multi-disciplinary approach to estate planning

The group is committed to the following principles:

- Integrity in professional lives
- Education as a continuing process
- Excellence in our work
- Career development, and
- Involvement in the profession, including participation in the National Association of Estate Planners & Councils (NAEPC)

We have planned an ambitious series of events for the 2025-2026 season, each designed to support the Council's mission and to appeal to its broad and diverse membership. We invite you to review the calendar and sign up for events online.

For those of you who may be new to CAEPC, we have posted information about CAEPC's mission and history as well as membership criteria and application procedure on the website.

For the success of the CAEPC organization, we encourage all members to join one of our committees and be an active participant in our estate planning community. We look forward to having you participate in our programs and other events.

Finally, we are always seeking to improve the Council, so we welcome feedback on how to better the organization. Please contact me or another board member directly with comments or questions about CAEPC.

Evan Judge, CAEPC President

2025-2026 BOARD



President

Evan Judge, CFA, CFP®
CAPTRUST
602-759-8771
[Send Message to Member](#)



Board Member

Ben Barchilon, CPA
Versant Capital Management Inc.
602-584-7507
[Send Message to Member](#)



Board Member

Christian A. Rogers, JD, MBA
Boyer Law p.c.
480-505-3480
[Send Message to Member](#)



Vice President

Melissa Loughlin-Sines, CPA, CFE,
CVA, CFF®, ABV
Gorman Consulting Group
602-850-5111
[Send Message to Member](#)



Board Member

Kathleen E Callaway
Fennemore Craig, P.C.
602-916-5432
[Send Message to Member](#)



Board Member

Larry Van Quathem, CFP®
ABLE Financial Group
480-494-2210
[Send Message to Member](#)



Secretary

Nicole Erin Hill
American Cancer Society
520-481-6454
[Send Message to Member](#)



Board Member

Brooks Elliot Crandell, JD
Morris Hall, PLLC
602-249-1328
[Send Message to Member](#)



Board Member

Rachel Zaslow, J.D.
Pendleton Square Trust
Company
480-520-5180
[Send Message to Member](#)



Treasurer

Julie K. Carlin, CPA
Eide Bailly
480-454-3231
[Send Message to Member](#)



Board Member

Sarah L Giles, JD
Bank of America Private Bank
480-624-0366
[Send Message to Member](#)

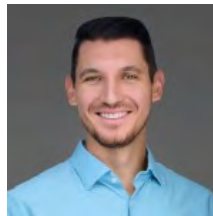
Administrator

Suzanne Lancot
[Send Message to Member](#)



Immediate Past President

Ashley L Case, J.D., LL.M., AEP®
Tiffany & Bosco, P.A.
602-255-6063
[Send Message to Member](#)



Board Member

Cole Leonida, CFP®, CPWA®,
CKA®
John Moore Associates
480-565-6100
[Send Message to Member](#)



Past President

William D Lee, CFA, CFP®
ARQ Wealth Advisors, LLC
480-214-9572 ext. 112
[Send Message to Member](#)



Board Member

Kristen Otsuka, CPA
Hunter Hagan & Company Ltd
480-946-0751
[Send Message to Member](#)



Board Member

Riley L. Arter, J.D.
Tiffany & Bosco, P.A.
602-255-6000
[Send Message to Member](#)



Board Member

Brian Poe
TFO Family Office Partners
[Send Message to Member](#)

PAST PRESIDENTS

2024-2025	Ashley Case
2023-2024	William Lee
2022-2023	Grant Boland
2021-2022	Kevin Wright
2020-2021	Allyson Califano
2018-2020	Remy Carpenter
2017-2018	Kyle Decker
2016-2017	Darren Case
2015-2016	David Walser
2014-2015	Stephen J. Taddie
2013-2014	Emily G. Burns
2012-2013	Joseph I. McCabe III
2011-2012	Mary Budzien
2010-2011	Ronald Larson
2009-2010	Maria Moreno
2008-2009	Tom Maguire
2007-2008	Barry McBride
2006-2007	John R. Becker
2005-2006	Jon Engebretson
2004-2005	Karen Dugger
2003-2004	Jerry Calley
2002-2003	Les Raatz
2001-2002	L. Jeannette Arthur
2000-2001	David McConachie
1999-2000	John F. Glass
1998-1999	Emily G. Burns
1997-1998	Michael McCartney
1996-1997	Mark Klein
1995-1996	William Finnegan
1994-1995	Peter Monzures*
1993-1994	Jerry Tuttle
1992-1993	Kenneth Maltenfort*
1991-1992	Philip C. Tower
1990-1991	Harold Dorenbecher
1989-1990	Mary Jane Boyd Rynd
1988-1989	David Case
1987-1988	Robert T. Johnson
1986-1987	Robert Garson
1985-1986	Beau Van Deren
1984-1985	Thomas Shumard
1983-1984	Murray F. Wilson
1982-1983	Stephen Lindstron
1981-1982	James Gallagher
1980-1981	David Haga
1979-1980	Ronald G. Wilson

1978-1979	Edward F. Jones, Jr.
1977-1978	Walter A. Martinez
1976-1977	Joseph McCabe
1975-1976	Hal Wales*
1974-1975	Al Olsen
1973-1974	Archie Walker*
1972-1973	Ron Saffer

1960's and early 1970's

Dave Davies
 Anthony V. Ehmann
 P. Robert Fannin
 Harry Feldman*
 Hank Goady*
 Jerry Gordon
 Bernie Hoogestraat
 William Isaacson
 (* Deceased)



CURRENT SPONSORS

EDUCATIONAL MEETINGS



REP SPONSOR



EMERGING PROFESSIONAL GROUP



DINNER WINE SPONSOR



WEBSITE SPONSOR



TECHNOLOGY SPONSOR



CURRENT SPONSORS

P I M C O



**HUNTER HAGAN
& COMPANY, LTD.**



-- GENERATIONAL WEALTH PLANNING --



ARIZONA
COMMUNITY
FOUNDATION



Zia Trust, Inc.
The Advisors' Trust Company®



**NORTHERN
TRUST**



MARK YOUR CALENDARS

December 1, 2025	Holiday Service Project & Mixer
December 10, 2025	NATIONAL EVENT: NAEPC Webinar: Complimentary - Honoring the Past, Empowering the Future: Creating and Using Traditions to Strengthen Family Engagement <i>John A. Warnick, JD, AEP® (Distinguished)</i>
January 12, 2026	January Program Meeting <i>Scott Wren</i>
January 21, 2026	NATIONAL EVENT: NAEPC Webinar: Complimentary - Letters of Wishes: Helpful Guidance from the Grave <i>Cindy Brown, JD, TEP and Kim Kamin, JD, AEP® (Distinguished)</i>
February 2, 2026	February Program Meeting <i>Mark R. Parthemer, JD, AEP, ACTEC Fellow</i>
March 2, 2026	March Program Meeting <i>David York</i>
April 23, 2026	CAEPC Golf Tournament & Happy Hour
May 4, 2026	May Program Meeting <i>Stacy E. Singer</i>

DESIGNATION & CERTIFICATION

The **Accredited Estate Planner®** designation is available to professionals engaged in active practice for five years or more in the disciplines of accounting, insurance and financial planning, legal, philanthropy, and trust services who hold an approved gateway degree or designation and who meet requirements of education, experience, knowledge, professional reputation, and character and will commit to ongoing continuing education and recertification requirements.

www.NAEPC.org/AEP

The **Estate Planning Law Specialist** certification is available to attorneys who demonstrate a high level of professionalism and commitment to the concept of specialization through the Estate Law Specialist Board, Inc., an attorney-run subsidiary of the National Association of Estate Planners & Councils.

www.NAEPC.org/designations/estate-law/introduction



NAEPC

NATIONAL ASSOCIATION OF
ESTATE PLANNERS & COUNCILS

COLLABORATE · EDUCATE · CULTIVATE

COUNCIL MEMBER BENEFITS GUIDE

Council of Excellence Award

Created in 2014, the National Association of Estate Planners & Councils Leonard H. Neiman & Walter Lee Davis, Jr. Council of Excellence Award recognizes councils that are successful in their efforts to provide a strong multi-disciplinary council for their members. Created by a group of council leaders, past presidents of NAEPC, and current Board and Council Relations Committee members, with all council sizes in mind, the Council of Excellence Award is intended to honor those councils that truly work to grow their programs and services and provide an exceptional member experience.

The award is named for two individuals who truly sought to strengthen the bond between NAEPC and its affiliated councils during their terms on the board. Walter Lee Davis, Jr. served as president of the association in 2008 and was instrumental in forming the Council Relations Committee, a group of volunteer members who are charged with being a liaison between affiliates and the national association. Leonard H. Neiman served the association as a board member for over fifteen years. He worked tirelessly to gather information about estate planning councils from around the country, both affiliated and unaffiliated, and to make contact with their leadership.

We consider this application a roadmap of best practices; things that help a council run smoothly and support a great member experience. NAEPC recommends that all councils review it each year to determine where they might like to make improvements or specific areas on which to focus its board efforts. It has been developed over many years of interaction with councils and their leaders and represents our current understanding of the practices that breed success. At the same time, the application is a reciprocal learning experience. The narrative portion gives NAEPC an opportunity to learn more about your council and what is happening within the council network. There has never been a better and more important time for this type of information sharing.



Council of Excellence

*2025 Honorees***LEADERS** in
the **ESTATE**
PLANNING
COMMUNITY.

COUNCILS OF EXCELLENCE
EPC of Greater Miami (FL)
Central Arizona EPC (AZ)
EPC of Long Island, Inc. (NY)
EPC of Cleveland (OH)
Boston EPC (MA)
Philadelphia EPC (PA)

5 STAR COUNCILS
EPC of Westchester County (NY)
York County EPC (PA)
Cincinnati EPC (OH)
Greater Boca Raton EPC (FL)
Hampton Roads EPC (VA)
Baltimore EPC (MD)

EMERGING COUNCILS
EPC of Bergen County (NJ)
EPC of Lake County (IL)
EPC of Northeast Wisconsin, Inc. (WI)
San Francisco EPC (CA)

YOUR BENEFITS

- Publication

The *NAEPC Journal of Estate & Tax Planning* provides a best-in-class library of thought leadership relevant to the estate planning community.

www.NAEPCJournal.org

- Education

In addition to your council's programming, NAEPC offers the Annual Advanced Estate Planning Strategies Conference & the Robert G. Alexander Webinar Series.

www.NAEPC.org/conference

www.NAEPC.org/events/webinar

- Cost-Savings

Over 40 member benefit providers providing discounts on their programs & services, available on your council's website or on the national website. www.NAEPC.org/membership/benefits



NAEPC & YOUR COUNCIL

The National Association of Estate Planners & Councils is an organization of professional estate planners and affiliated estate planning councils committed to fostering the multi-disciplinary approach to estate planning.

**ONE NATIONAL NETWORK OF ESTATE PLANNING PROFESSIONALS
FOCUSED ON**

EXCELLENCE IN ESTATE PLANNING

CONNECT

866-226-2224

www.NAEPC.org

admin@NAEPC.org

2001 Crocker Rd., Ste. 510
Westlake, OH 44145

Join us on LinkedIn

AEP® Designation

Professional estate planners can obtain an accreditation that acknowledges their experience and specialization in estate planning. Simply put, the Accredited Estate Planner® designation means “I believe in the team concept of estate planning.”

Awarded by the National Association of Estate Planners & Councils to recognized estate planning professionals who meet special requirements of education, experience, knowledge, professional reputation, and character, the AEP® designation helps both clients and colleagues understand your belief in, and dedication to, the team concept of estate planning.

The Accredited Estate Planner® designation is available to attorneys*, Chartered Life Underwriters®, Certified Public Accountants, Certified Trust and Financial Advisors, Chartered Financial Consultants®, and Certified Financial Planner® practitioners who are actively engaged in estate planning and meet stringent qualifications at the time of application and commit to ongoing continuing education and recertification requirements.

Why should you be interested in earning the AEP® designation?

- Gain a competitive edge and set yourself apart from the competition
- Demonstrate your knowledge, skill, and expertise
- Identify yourself as a qualified member of the estate planning team
- Listing on **national searchable database** including discipline and contact information where one can search by state or zip code
- AEP® ALERT – bi-monthly electronic newsletter for designees only with original content provided in the “Technical Corner”; archives are available on the NAEPC website and can be accessed by using national username and password
- Complimentary attendance at the [Annual NAEPC Advanced Estate Planning Strategies Conference](#)
- Deepest discount for the [Robert G. Alexander Webinar Series](#) where designees can earn continuing education credit for the AEP® designation. Programs typically occur on the second Wednesday of every month 3:00 - 4:00 pm ET with the exception of November when we host our annual conference. Special discount for AEP® designees is \$40!
- Designee-only events offered on a complimentary basis where you can meet and network with fellow designees and share your ideas about member benefits with the national leadership.
- Invitation to contribute to the exclusive [AEP® group on LinkedIn](#)

AEP® Candidate Experience and Education Requirements:

- Eligible candidates with at least 5 years of [estate planning-related experience](#) will be considered after passing **two required courses** with The American College of Financial Services.
- Eligible candidates with 15 or more years of experience are exempt from the required courses.
- A CAEPC council nomination provides an exemption from the required courses with only 10 years of experience. A council nomination also provides a 50% discount on the application fee and an exemption from the professional references. **Click here** to learn more and contact a [CAEPC AEP® Committee Chair](#) to be considered for nomination before applying (a special application will be given to nominees.)

For additional information, requirements and applications, use these links:

- [FAQ about the AEP® Designation](#)
- [AEP® Qualifications and Requirements](#)
- [AEP® Application for those with at least 5 years of experience](#)
- [AEP® Application for those with 15 or more years of experience](#)
- [Find an Accredited Estate Planner® near you](#)

*Attorneys: if you are conferred the AEP® designation, you should use the following disclaimer wherever possible on your materials that include the AEP® or Accredited Estate Planner® marks: “The Accredited Estate Planner® (AEP®) designation is awarded by the National Association of Estate Planners & Councils (NAEPC).” As with most other designations, you should not claim the AEP® designation makes you a “certified specialist” per the State Bar of Arizona’s definition and per Arizona Supreme Court order No. R-20-0030. The NAEPC and CAEPC are not responsible for your use of the AEP® marks and we recommend you contact the **Bar’s Ethics Department** with any questions/concerns. The **Estate Planning Law Specialist** or **Estate & Trust Law Specialist** designation programs may be suitable alternatives in Arizona.





Sponsor Commitment Form

*Preferred meeting
(choose two)*

Meeting Dates	Event Description and Sponsor Cost		1 st Choice	2 nd Choice
October 6, 2025	October Continuing Education Event – Joint event with the Phoenix CFA Society <i>Speaker TBD</i> <i>Topic TBD</i>	\$3,500	<input type="checkbox"/>	<input type="checkbox"/>
November 3, 2025	November Continuing Education Event – <i>Speaker TBD</i> <i>Topic TBD</i>	\$3,500	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
December 2025	December Holiday Gathering	\$2,500	<input type="checkbox"/>	<input type="checkbox"/>
January 12, 2026	January Continuing Education Event – <i>Speaker TBD</i> <i>Topic TBD</i>	\$3,500	<input type="checkbox"/>	<input type="checkbox"/>
February 2, 2026 ½ Day Program	Half Day Continuing Education Program - 1st Half – <i>Speaker TBD</i> <i>Topic TBD</i>	\$3,500	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
February 2, 2026 ½ Day Program	Half Day Continuing Education Program – 2nd Half – <i>Speaker TBD</i> <i>Topic TBD</i>	\$3,500	<input type="checkbox"/>	<input type="checkbox"/>
March 2, 2026	March Continuing Education Event – <i>David R. York, Esq., CPA</i> <i>Raising Children in Affluence: The Four Lessons of Wealth</i>	\$3,500	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
April 23, 2026	Annual Spring Golf Tournament <i>Varied Sponsorships Available</i>	Varied	<input type="checkbox"/>	<input type="checkbox"/>
May 4, 2026	May Continuing Education Event – <i>Speaker TBD</i> <i>Topic TBD</i>	\$3,500	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2025-2026 Season	Master Website Sponsor <i>A full year of front-page visibility!</i>	\$4,000	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2025-2026 Season	Emerging Professionals' Group Scholarship	\$2,250	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2025-2026 Season	Accredited Estate Planner (AEP) Event Sponsor	\$2,000	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2025-2026 Season	Dinner Wine Sponsor (Recognition Every CE Event)	\$4,500	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2025-2026 Season	Meeting Prize Sponsor (Recognition Every CE Event)	\$3,500	<input type="checkbox"/>	<input type="checkbox"/>
2025-2025 Season	Technology Sponsor (Recognition Every CE Event)	\$3500	<input type="checkbox"/>	<input type="checkbox"/>
2025-2026 Season	Continuing Education Certificate Sponsor (Recognition Every Dinner)	\$2,000	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved



Sponsor Commitment Form (p 2)

- This sponsorship commitment form is your key to securing your sponsorship.
- Please complete both pages and return by email. It will be date and time stamped.
- We honor all preferences as best as we can and settle competing requests by date and time stamp of receipt.
- Two months following the initial sponsorship offering, any open sponsorship positions will be advertised to all CAEPC members.

Thank you for your support of our Council!

1. Our **firm's name** for sponsorship recognition is (the name below will be used on all published materials):

2. Our **firm's contact/meeting representative is:** _____
Contact's phone number: _____
Contact's e-mail address: _____
3. Sponsorship Commitment Signed by: (contact's signature and title/authority to contract)

Signature Title
4. Our expected sponsorship fee for our meeting or sponsor choice is: \$ _____
5. Please include a weblink posting on the CAEPC website for our organization.
Our website address is: _____
6. Payment Information (payment is due for pre-committed sponsors of the 2025-2026 season after June 1, 2025, but at the latest, 30 days prior to the committed event date). *Check is preferred.* Please select one of the following:
☐ We will mail a check.
☐ Please invoice us.
7. I acknowledge by signing this Sponsorship Commitment Form that CAEPC is authorized to publish our logo in all materials relating to our sponsorship of CAEPC and its events, as is determined by the CAEPC board and sponsorship committee. Questions may be directed to the sponsorship chair through info@caepec.org
8. Attached, via email, is our press quality logo (format preferred .tif or .jpg, 300 dpi or higher quality, file size not to exceed 1MB) info@caepec.org
9. Anticipated visibility for 2025-2026 season only, described on following page.
10. If an in-person event is cancelled due to public health concerns, we will contact you regarding your options to roll over your sponsorship to the following season or receive a refund.

Note: As of June 30, 2022, this is our planned program for the season.
Please realize that all speakers/topics listed above are potentially subject to change
(illness, family obligations, last minute court dates or scheduling conflicts may arise) and scheduling issues may impact scheduled dates.



2025-2026 Season Sponsor Benefits Outline

Continuing Education Event Sponsor:

- Ability to bring 2 guests to the meeting you sponsor
- Ability to invite other staff to attend virtually via our Zoom presentation
- Ability to self-market on our social media sites
- Year-round logo and link on specific event page on website
- CAEPC signage "Thank you to XYZ sponsor" on rotating PowerPoint at beginning of presentation
- Opportunity to speak for a few minutes at the beginning of the meeting and introduce the speaker; can bring other visuals to be seen prior to meeting

Holiday Event:

- Logo on holiday event page on website
- CAEPC printed signage "Thank you to XYZ sponsor" at event
- 2 free guest registrations
- Table to advertise company information
- Receives a couple of minutes to address event attendees

Spring Event:

- Logo on spring event page on website
- CAEPC printed signage "Thank you to XYZ sponsor" at event
- 2 free guest registrations
- Table to advertise company information
- Receives a couple of minutes to address event attendees

Master Website:

- Full year of front page "Banner" visibility
- CAEPC signage "Thank you to XYZ sponsor" on rotating PowerPoint at beginning of CE presentations

EPG:

- Logo on EPG event page on website and Emerging Professionals' Group page
- CAEPC printed signage "Thank you to XYZ sponsor" at event

Happy Hour Sponsor:

- Logo on "Sponsors" website page
- Table triangles with sponsor recognition at every happy hour event

AEP:

- Logo on AEP event page on website
- CAEPC printed signage "Thank you to XYZ sponsor" at event

Meeting Prize:

- Logo on "Sponsors" website page
- Opportunity to speak at the end of continuing education events and announce winner

Dinner Wine:

- Logo on "Sponsors" website page
- Table triangles on every table with sponsor recognition at every dinner program

Technology Sponsor:

- Logo on "Sponsors" website page
- Table triangles with sponsor recognition at every dinner program and recognition on Zoom

CAEPC Golf Tournament & Happy Hour

Date: Thursday, April 23, 2026

Time: 12:00pm - 6:00pm

Location: Papago Golf Club, 5595 E. Karsten Way, Phoenix, AZ 85008



Thank you to our Title Sponsor!

2026 Golf Tournament & Happy Hour!

This event is open for all members and not just golfers. Following the golf tournament, we will hold a networking happy hour. Please stay after for small bites and connections on one of the nicest patios in town! Non-golfing members are welcome to join the happy hour and enjoy the beautiful setting of Papago.

Secure your foursome now. Four person scramble. Bring clients and associates and fill a foursome!

Sponsorships start as low as \$250 and provide your company with exposure leading up to and during the event.

Schedule:

12:00 p.m. Check-in

12:45 p.m. Shotgun Start

05:00 p.m. Happy Hour

For questions, please reach out to info@caepec.org.

The golf tournament is an important component of the CAEPC calendar. The net proceeds from the event will go directly back into the local organization which benefits all members. Among other benefits this event allows us to continue to host great presenters and make investments such as new technology to ensure that remote attendees have a good virtual experience.

Cancellation Policy: All cancellations must be requested in writing and received no later than April 15, 2026. Cancellations are subject to a \$50 cancellation fee. No refunds provided after April 15, 2026.

Thank you to our Happy Hour Sponsors!

Thank you to our Beverage Cart Sponsor!

By registering for this event, you grant the Central Arizona Estate Planning Council (CAEPC) permission to take photographs or video of you during the event. These images and videos may be used on the CAEPC website, social media pages, and/or in newsletters for promotional purposes.





Holiday Service Project & Mixer

Monday

December 1

4:00 – 6:30 pm

Liberty Wildlife, 600 E Elwood Street, Phoenix, AZ 85040

Join us for a heartwarming evening of giving back and celebrating the season! We'll kick off the event with a service project to help make a difference in our community, followed by a festive holiday mixer. Enjoy delicious hors d'oeuvres, drinks (beer, wine & soft drinks), and great company as we connect with colleagues and friends.

Monday, December 1, 2025

4:00 PM – 5:00 PM: Service Project – simple, hands-on tasks that make a big impact, with minimal mess! Dress comfortably and wear closed-toe shoes (sneakers preferred).

5:00 PM – 6:30 PM: Holiday Mixer with Hors d'oeuvres & Drinks

Location: Liberty Wildlife, 2600 E Elwood Street, Phoenix, AZ 85040

The evening will feature a beautiful sunset at 5:20 PM, setting the perfect tone for the season ahead. The event will be outside, so please dress appropriately.

Members: Free

Guests: \$25

This is a wonderful opportunity to start the holiday season with a spirit of giving and camaraderie. We look forward to seeing you there!

Sponsorship opportunities available. Let's talk!

Thank you to our sponsor



**HUNTER HAGAN
& COMPANY, LTD.**

February Program Meeting

Date: Monday, February 2, 2026

Time: 7:00am – 12:15pm

Location: Gainey Ranch Golf Club, 7600 E Gainey Club Dr, Scottsdale, AZ. 8 5258

Speaker: Mark R. Parthemer, JD, AEP, ACTEC Fellow

Thank you to our sponsors!



ARIZONA
COMMUNITY
FOUNDATION



Zia Trust, Inc.
The Advisors' Trust Company®

Tentative Topic: Estate Planning Potpourri – Current Developments, Heckerling Update, and Digital Asset Buffet

Speaker: Mark R. Parthemer, JD, AEP, ACTEC Fellow

Mark R. Parthemer, JD, AEP, ACTEC Fellow, is Glenmede's Chief Wealth Strategist and Florida Regional Director. He is responsible for developing and communicating Glenmede's position and strategy concerning tax, estate planning and fiduciary matters pertinent to clients and their advisors, as well as cultivating growth and operations of Glenmede throughout Florida.

Prior to joining Glenmede, Mr. Parthemer served as Managing Director for TIAA and Managing Director and Senior Fiduciary Counsel for Bessemer Trust, working with ultra-high-net-worth clients to deliver sophisticated tax and estate planning advice and provide tailored guidance. His previous roles include law partner at Duane Morris, LLP, and Senior Tax professional at PricewaterhouseCoopers.



Mr. Parthemer is a Fellow of the American College of Trusts Estates Counsel, and President of Florida Bankers Association Trust and Wealth Management Division. He is also Group Vice Chair for the American Bar Association, RPTE Trusts and Estate Practice Group, and often faculty for the University of Miami's prestigious Heckerling Institute. He earned a Bachelor of Arts and a Bachelor of Science from Franklin & Marshall College and Juris Doctor from The Dickinson School of Law, Penn State University. Mr. Parthemer is a nationally recognized speaker and a frequently published author. He is an editor and columnist for both the Journal of Financial Services Professionals and the ABA's Probate & Property magazine. He is often quoted on tax and estate planning matters in publications such as the Wall Street Journal, CNBC, Barron's, Bloomberg Tax, and Kiplinger's.

RSVP must be received by 12:00 p.m. on Wednesday, January 28, 2026. Registration will close at this time.

Submitting an RSVP for this event implies your agreement [to the following COVID-19 policy](#). By registering for this event, you grant the Central Arizona Estate Planning Council (CAEPC) permission to take photographs or video of you during the event. These images and videos may be used on the CAEPC website, social media pages, and/or in newsletters for promotional purposes. Please note that Insurance CE credits are not available for Zoom participants. Zoom participants can still earn CFP and ABA credits by notifying CAEPC, but insurance CE credits will not be offered for the virtual format.

Breakfast Menu

- Schedule**
- 7:00 a.m. Registration & Breakfast
 - 8:00 a.m. Session I
 - 10:00 a.m. Break
 - 10:15 p.m. Session 2
 - 12:15 p.m. Program Concludes

Attendees understand and agree that their contact information may be shared with the event sponsor(s).

EVENT CONDUCT STATEMENT

The Central Arizona Estate Planning Council ("CAEPC") is committed to providing all participants at our events with an inclusive and professional environment where they feel comfortable. These events include but are not limited to: educational programs and supplemental activities or programs included as a part of these events; webinars; and virtual and in-person board and committee activities and meetings; or presentations before local councils or to other organizations when speaking on behalf of CAEPC. Participants, who include attendees and their guests, volunteers, vendors, staff, and all others, are expected to conduct themselves in a manner that is welcoming, respectful and free from any form of discrimination, harassment, or retaliation. Disruptive or harassing behavior of any kind will not be tolerated. Participants asked to stop such behavior are expected to comply immediately. In keeping with our commitment to the health and safety of all participants, those who feel ill are asked not to attend in-person events or face to face activities. In the event that a participant feels unwell mid-conference, he/she/they are asked to refrain from attending any portion of the conference that includes face to face activities.

Emerging Professionals' Group

The Emerging Professionals' Group (EPG) of Central Arizona Estate Planning Council (CAEPC) is a vibrant group of younger professionals who are under age 40 or who have less than 10 years of experience. This group is focused on social and educational events for individuals newer to the professions involved with estate planning. CAEPC membership is not required to participate; invite your friends!

The professional demographic includes legal, accounting, investment, insurance, financial planning, and other estate planning-related professions.

Interested in receiving an EPG scholarship for CAEPC membership?

[Click here for scholarship guidelines.](#)

[Click here for the application.](#)

2025-2026 Emerging Professionals' Group Committee Chairs

Riley L. Arter, J.D. and Kristen Otsuka, CPA

For more information, contact [Claudia L. Grajeda, J.D.](#) 602-288-7924 or [Riley L. Arter, J.D.](#) 602-255-0397.

Emerging Professionals Group Scholarship Recipients:

2021-2022

Matthew Cherry

2019-2020

Caitlin Caputo

2018-2019

Andrew Donohue

Justin McKay

2017-2018

Kimberly Shocklee

2016-2017

Allyson Von Seggern

Megan Ruffentine

Logan Woodruff

2015-2016

Justin Cole

Nadia Cunningham

Ryan Krafczik

2014-2015

Kevin Wright

Amara Chorney

Natalie Boocher

2013-2014

Rachel Zaslow

Marcus Johnson

Lindsey Goldman



Membership Directory



[Printable Member Directory](#) (online link only available to members)

You must be logged in to print the member directory. Login now.

Use of this membership listing for mass solicitation is prohibited. Associate Members self-select professional disciplines and self report professional credentials. It is the Associate Member, not the CAEPC, that is responsible for the accuracy of that information. Users of this database, whether professional or public, are responsible for verifying the accuracy of any information contained in the membership directory.





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