



Washington, D.C. Estate Planning Council President's Message November 2015

The fiscal year is well underway and the Washington, D.C. Estate Planning Council is undertaking many exciting initiatives.

Communications: I hope you've checked-out the Council's new [website](#) and the list of upcoming [events](#). You recently received an invitation to join the WDCEPC members-only [LinkedIn](#) group. Connect to keep informed of WDCEPC happenings and member news.

Membership Recruitment: It is time to reach-out to those who might be interested in membership. Eligibility requirements include three years of estate planning experience and attendance at two WDCEPC meetings. The [membership package](#) is available on the website and is due by February 1, 2016.

A fun evening is planned for prospective members and their sponsors. On December 1, join us at [Jack Rose Dining Saloon](#) in Adams Morgan for a mixology demonstration, cocktails and hors d'oeuvres. [Register](#) online. This event counts towards the prospective member meeting requirement.

Member Survey: The Board and I greatly appreciate the valuable input received from the 64 members who completed the survey. This will help us meet your needs in areas such as meeting location and time of day, and the annual meeting arrangements. Based upon interest, we'll rotate our breakfast meetings this fiscal year. Our October breakfast was in DC. January will be in Friendship Heights and May will be in Tysons.

Member Retrospective Series: We're offering a new series primarily designed for members in the first ten years of their estate planning careers. This will be a unique opportunity to hear veteran Council members discuss their backgrounds and career paths, and provide advice on developing a successful and fulfilling career in the estate planning field.

Golf: Over 100 members and guests enjoyed a day of golf and fellowship at the WDCEPC's annual [golf tournament](#) in September. I want to thank the participants and our generous [sponsors](#) who provided a record amount of funding for the Council. A special thank-you goes to the Golf Committee and the co-chairs, Vernon Holleman and Melinda Merk.

I look forward to seeing you at the [November 17 meeting](#) at The City Club at 5 p.m.

Best regards,
Pam Shortal, CPA, CFP®