



Washington, D.C. Estate Planning Council

President's Message

June 2016

As a successful year draws to a close, I'd like to thank all who made it possible -- our members for their active participation, and our **board**, **committees** and **executive director** for their contributions, dedication and tireless efforts on behalf of the Council.

After a year of robust educational programs, we ended with a special annual meeting at The Mansion on O Street. I'd like to highlight some the accomplishments of the year.

Membership New members are vital to the Council's future. Our members did a great job introducing their colleagues to the WDCEPC and we were pleased to welcome 17 **new members**. To supplement our members' efforts, we recently formed a new committee devoted to membership recruitment. In addition, the Membership Committee will now review membership nomination packages twice per year instead of once. Nomination packages for consideration will be due no later than October 1 and March 1.

Financials Thanks to the hard work of the Golf Committee, the generosity of our **sponsors**, and the participation of our members, this was the most successful golf tournament, raising a record amount of funds for the Council. We, therefore, will end the year in a strong financial position. Our events cost more than the amount covered by dues and meeting fees. To continue to expand programming and to keep the costs to our members reasonable, the board has decided to explore additional sponsorship opportunities. Rest assured it will be done in a manner consistent with our heritage and traditions. You'll be hearing more about this from the newly formed committee.

Communications I hope you have found it easier to obtain information about the WDCEPC and fellow members with the deployment of our new website and LinkedIn.

In addition, there were several other noteworthy developments.

- WDCEPC began offering continuing education credits for qualified programs to CPAs, CFP® professionals and Virginia attorneys.
- The **golf** outing will have a new, centrally located venue in 2016. Join us on September 26th at Kenwood Country Club in Bethesda for the golf tournament and beginners' clinic. Not a golfer – join us for dinner.
- The Council Enhancements Committee started a new program called Inside the Member's Head (Member Retrospective Series). It's a great opportunity for you to learn from veteran WDCEPC members about developing a successful career in estate planning.

I am honored to have served as your president and look forward to seeing you at our **fall kick-off meeting** on September 21st at The City Club. Have a great summer!

Best regards,
Pam Shortal, CPA, CFP®