ESTATE PLANNING COUNCIL OF CENTRAL NEW YORK

Dear AEP Members,

Regardless of when you received your AEP designation from NAEPC, your continued renewals are indicative of the value you place on renewing your commitment to the AEP Code of Ethics and the team concept of estate planning.

EPCCNY currently has 24 AEP members in a Council of 114 members. Many of you have attained your designation more than 10 years ago!

Since the team concept and collaboration is at the very heart of our Council’s mission, we would like to recognize those who have committed to the AEP and encourage other members among all our disciplines to pursue the AEP designation.

We are experiencing the “wave” of experienced estate planners nearing retirement. Our membership amongst the “NEXT GENERATION” is also growing but needs the opportunity to meet and forge professional collaborations with other members, including AEP members. Please encourage council members whom you believe qualify for the AEP designation to make application.

The AEP committee has been planning an event for just this important purpose and to recognize the strong group of AEP’s we currently have.

There is a SAVE THE DATE announcement with this email. We have an opportunity to meet and greet our newest members AND to share your wisdom and perspective on how the AEP designation has impacted your estate planning practice.

Won’t you join us for a social networking and a brief program to Recognize and thank our long standing members who have supported the AEP designation?

A formal evite will be sent shortly . We ask that you RSVP by June 1,2022. We look forward to seeing you there!

Lee M. Gatta , Chair

Susan Viel

Jennifer Alfieri ( Immediate Past Pres)

Richard Murphy

Tom Griffith

Ted Sarenski

William Davies ( Next Gen committee)