2025/2026 DCEPC MEMBERSHIP APPLICATION

Welcome to the 2025/2026 Delaware County Estate Planning Council year.

We will be meeting at The Towne House in Media for cocktails, a buffet dinner and our informative programs. Our first meeting will be on Tuesday, September 9, 2025.

Membership is now open for first time and renewing members either through the mail-in form below or the website Membership section @ www.dcepc.org/membership.

Council members will have the opportunity to avail themselves of the NAEPC benefits and educational programs as well as the opportunity to earn the AEP (Accredited Estate Planner) designation through the National Association of Estate Planners & Councils (NAEPC).

The DCEPC has a great line-up for our 2025/2026 Speaker Series per the info below.

2025/2026 PROGRAM/EVENT CALENDAR:

September 9, 2025 HOW TO GET THE MOST OUT OF SOCIAL SECURITY

Robert Kron, CFP. Nuveen Managing Director of Advisor Education

October 14, 2025 PA DIRECTED TRUST ACT & WHAT IT MEANS FOR YOU & YOUR CLIENTS

C. Thomas Work, Esq. of Stevens & Lee, Reading PA

November 11, 2025 HOW TO MAKE ARTIFICIAL INTELLIGENCE WORK FOR YOU

Ross Bruch, Esq. Senior Wealth Planner at Brown Brothers Harriman

December 9, 2025 HOLIDAY PARTY

January 13, 2026 HOW TO PREPARE AN ESTATE PLAN FOR THE MENTALLY ILL CLIENT

Lesley M. Mehalick, JD, LLM of the McAndrews Law Firm.

February 10, 2026 PLANNING FOR THE UNEXPECTED, NOW WHAT?

Colleen Neary, Esq.- Sweeny & Neary and Chari Alson, Esq- Anderson Elder Law

March 10, 2026 A SNOWBIRD'S GUIDE TO ESTATE PLANNING

Jill Fowler, Esq. of Heckscher, Teillon, Terrill & Sager PC, Conshohocken, PA

April 23, 2026 JOINT POST-TAX SOCIAL WITH CHESTER COUNTY

Notices will be sent about 3 weeks before each meeting for reservations to be made. For additional information, check the Council website above or call Donna Willis at 610-565-3800 x 5.

ANNUAL MEMBERSHIP FEE-$ 85.00 for the Council year June 1, 2025 through May 31, 2026.

CLE CREDIT FOR ATTORNEYS AND CPA CREDITS ARE AVAILABLE

PLEASE COMPLETE THE MEMBERSHIP FORM ONLINE OR COMPLETE THE FORM BELOW, AND RETURN IT WITH YOUR ANNUAL DUES CHECK PAYABLE TO "DCEPC" TO: DCEPC, PO BOX 2083, MEDIA, PA 19063

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2025/2026 DCEPC MEMBERSHIP APPLICATION

NAME\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_NEW MEMBER\_\_\_\_\_\_FIRM\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TITLE: CPA CLU CFP ChFC ESQ TRUST OFFICER OTHER\_\_\_\_\_\_\_ (Circle one)

DISCIPLINE(S)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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WEBSITE\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_