



# ESTATE PLANNING COUNCIL OF THE FUN COAST

COLLABORATE • EDUCATE • CULTIVATE

The Estate Planning Council of The Fun Coast is an interdisciplinary organization for professionals involved in estate planning. We include professionals from five primary membership groups: *Attorneys, Bank Trust Officers, Certified Financial Planners, Certified Public Accountants and Chartered Life Underwriters*. We welcome and involve other parties having to do with Estate Planning, including planned giving and development officers from charitable 501(c)(3) organizations and individuals in other professions or occupations who support the goals, objectives, and methods of the Estate Planning Council of the Fun Coast.

*We work to foster the understanding of the proper relationships among these disciplines, and we encourage the cooperation of persons comprising the Estate Planning Team.*

## MEMBER BENEFITS:

- Networking opportunities with local professionals
- Continuing education
- Social events
- Opportunity to become an Accredited Estate Planner®
- Access to Journal of Estate & Tax Planning
- Access to the annual Advanced Estate Planning conference
- Members only discounts on estate planning publications, webinars, and software
- Listing in Member Directory on our highly trafficked website

## OUR CHAPTER MEETS EVERY THIRD THURSDAY OF THE MONTH

Meetings are centered around relevant and informative presentations.

Our past speakers included probate and guardianship judges, investment strategist, attorneys, CPAs, Medicare specialist, financial advisors, life insurance underwriters, and other estate planning experts.

Council meetings offer great networking opportunities. Our goal is to promote professional acquaintance and interaction fostering the team concept of estate planning

For more information about the Estate Planning Council of the Fun Coast, upcoming events, Member Directory or to join our Council or Mailing List, visit us at: [www.epcfuncoast.org](http://www.epcfuncoast.org).

For the latest updates, visit our LinkedIn  or Facebook  pages.

*Estate Planning Council of The Fun Coast is affiliated with the National Association of Estate Planners & Councils <https://www.naepc.org/>. Please contact the national office at 866-226-2224 to learn more about the Accredited Estate Planner® designation.*