

President's Message: Fall 2016

Greetings to all Members:

I am delighted to welcome all of you to the 2016-17 season of the East Valley Estate Planning Council (EVEPC). I would especially like to welcome all of our new members. EVEPC provides an un-paralleled opportunity for east valley estate planning professionals to network with and learn from one another. I have enjoyed getting to know many of you and hope to meet all of you during this upcoming season.

We have scheduled an exceptional and diverse group of speakers who have agreed to share their wisdom and experience with us this year. This year's presentations cover a broad range of topics including the following:

- Representing clients with diminished capacity;
- Mexican and Canadian international planning;
- Social security claims;
- Charitable trusts;
- Business development; and
- New DOL regulations for investment fiduciaries.

You can review all our events for the 2016/17 season on our website by [clicking here](#).

One of the ways in which we have improved the EVEPC experience is to allow all guests to introduce themselves at the beginning of all our meetings. We will continue this practice and invite our long-time members to come early and meet some of our guests and newer members.

A new way we are encouraging alliances with other estate planning professionals is to join efforts with similar organizations who share our goals and purpose. To that end, this season will introduce a new joint event with the Financial Planning Association of Greater Phoenix*. In April (after tax season), we will have the opportunity to collaborate with financial professionals from across the valley during lunch at the Mesa Country Club and receive updates from Jay Adkisson on Asset Protection.

We will continue to find more ways to build relationships and foster growth in the professional estate planning community.

I look forward to a tremendous 2016-17 season!

Sincerely,

Jason M. Ray

2016/17 EVEPC President

*Membership dues do not include registration for this joint event, but do provide for a reduced registration fee.