Jackson Area Estate Planning Council

Membership Dues Notice (2021-2022 Season)

Amount Due: $100.00

Membership Dues. Membership dues for the Jackson Area Estate Planning Council are due by **September 5, 2021**. Please complete this form and mail it and your dues check to the Treasurer listed below. Checks should be made payable to the Jackson Area Estate Planning Council, and please include the name(s) of the paying member(s) on the check to ensure proper credit.

Jackson Area Estate Planning Council
c/o Steve Patch
Lally Group, P.C.
P.O. Box 1066
Jackson, MI 49204-1066

Membership Information.

Name: ____

Company: ____

Mailing Address: ____

City, State, Zip: ____

Phone Number: ______________________ E-Mail: __________________________

Please include one category that describes your profession:

____ Attorney ____ Accountant/CPA ____ Insurance ____ Financial Planner/Adviser

____ Trustee/Bank ____ Gift Planning/Development ____ Associate/Other (____________________)

Meetings. Unless otherwise noted, noon on the second Wednesday of the month at Veritas. September, November, January, March, May, July. Meeting details may change to accommodate schedules.

Dues Information. Dues include the cost of the monthly luncheons, costs associated with acquiring speakers, general administrative expenses, and other activities deemed appropriate by the Council. First time guests are free to encourage new members to join, and subsequent guest luncheons are charged $20.00 each.

About Us. The purpose of the JAEPC is to promote effective communication among professionals employed in the broad field of financial and estate planning. Our objective is to foster a better understanding of the problems and issues involved and the roles of various estate planning professionals in solving these problems. The Council also provides continuing education that will enable members to provide better service to clients and the community in general. This is especially important in understanding the impact of new laws regarding taxes, probate, trust administration, and insurance. Thus, by promoting better communication, the Council provides a forum for the exchange of ideas, techniques, and approaches for solving our clients' estate management issues.