

Houston Business & Estate Planning Council

August 9, 2021

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Dear HBEPC Members,

I hope this letter finds you well. One constant over the past year has been change, and it appears that the COVID situation continues to be ever-changing. For now, we plan to have our 2021-22 meetings in person and are very happy to be back at River Oaks Country Club for another great year. We will communicate any masking or distancing requirements mandated by ROCC as we receive further guidance.

This year, our joint meeting with HEFF will take place in January 2022 and will feature Professor Samuel Donaldson of the University of Georgia School of Law.

We are excited to present this year's speaker list, covering timely and diverse topics:

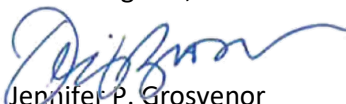
- **September 23** – Will Frazier; Recent Tax Court Cases Point to Changes in FLP Valuations
- **October 21** – Paul Comstock; Charitable/Generational Topic
- **November 17** – Katherine Akinc & Matthew Badders; Trust Topic
- **January 28** – Sam Donaldson; Joint meeting with HEFF
- **February 17 (evening)** – Sarah Pacheco & Jimmy Walker; Probate Litigator Panel
- **March 10** – TBD
- **April 21** – TBD
- **May 12** – Annual Social – It's a Party!

More information about each meeting can be found on our website (www.hbepec.org). Notices for meetings will continue to be sent via email - if for any reason you are not receiving the notices, please contact Gib Surles (his contact info is on the left side of this letter). Outlines and materials will be posted on our website.

Attached you will find our dues notice. Since we did not decrease our dues last year, we were able to dramatically decrease them this year. Dues for active HBEPC members for this year only are \$100 and guest fees remain \$60 per meeting. Please complete the dues form and send it along with your dues to our treasurer, Bryan Phillips, by September 17, 2021. Bryan's address can be found on the notice. This year you will also be able to pay your dues by credit card via PayPal on our website.

On behalf of your HBEPC Board, we look forward to another year of learning and being a part of this great HBEPC community. Enjoy the rest of the summer and see you soon.

Warm Regards,


Jennifer P. Grosvenor
President