

# Houston Business & Estate Planning Council

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August 7, 2023

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Dear HBEPC Members,

I hope this letter finds you well. On behalf of the Board, we are all looking forward to a brand new year and are very happy to continue to meet at the River Oaks Country Club.

Our joint meeting with HEFF will take place in January 2024 at the Junior League of Houston and we are pleased to, once again, feature Professor Samuel Donaldson of the University of Georgia School of Law.

We are excited to present this year's outstanding speaker list, covering timely and diverse topics. Due to scheduling conflicts, you will note that a couple of the meetings will take place on a day other than our normal Thursday:

- **September 7<sup>th</sup>** – Will Frazier – “Cecil v. Commissioner: The Last Resort for Tax Affecting”
- **October 19<sup>th</sup>** – Steven J. Hare – Cross Border Probate Topic
- **November 10<sup>th</sup>** – Stephen Baxley, Kevin Barry, et al. – Fiduciary Income Tax Topic
- **January 26<sup>th</sup>** – Prof. Sam Donaldson (Joint meeting with HEFF)
- **February 14<sup>th</sup>** – Hobbs Gnaim – Business Succession Topic
- **March 14<sup>th</sup> (evening meeting)** – Winston Art Group: Wine as an Asset and for Drinking - Lecture and Wine Tasting!
- **April 18<sup>th</sup>** – Preston Sartelle and Edmund Perry – Insurance Topic
- **May (TBD)** – Annual Social – It's a Party!

Notices for the meetings will continue to be sent via email two weeks prior to the date - if for any reason you are not receiving these notices, please contact our Secretary, Sarah Snook (her contact info is on the left side of this letter). Outlines and materials will be posted on our website when made available.

This year's dues for active HBEPC members will remain to be \$425 and guest fees will remain to be \$70 per meeting. **We encourage you to renew your membership online ([www.hbepec.org](http://www.hbepec.org)) where you can pay by credit card via PayPal** (an additional service fee will apply). Just log in and select “Member Renewal” in the Membership drop-down menu. If you need to submit a paper check, please fill out and include the attached enrollment form when mailing your check. **Member renewals are due by September 7, 2023.**

We hope you are as excited as we are for 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,



Gib Surles  
President

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