

Houston Business & Estate Planning Council

August 17, 2015

President

Martie Herrick

JPMorgan Chase Bank, N.A.
712 Main Street, 11th Floor North
Houston, TX 77002
(713) 216-8392 Fax (713) 216-1370
Email: martie.herrick@jpmorgan.com
Assistant: Donna Harmon
Email: donna.s.harmon@jpmorgan.com

Vice President

Andrew T. Gardener, CFP

Tanglewood Legacy Advisors, LLC
One Riverway, Suite 1550
Houston, TX 77056
(713) 599-4999 Fax (713) 599-4989
Email: agardener@family-cfo.com

Secretary/Webmaster

Brian Cororve, JD

Campbell & Riggs
1980 Post Oak Blvd., 24th Floor
Houston, TX 77056-3810
(713) 621-6721 Fax (713) 621-5453
Email: bcororve@campbellriggs.com

Treasurer

Terri Siegel, CPA

McGladrey, LLP
1400 Post Oak Blvd, Suite 900
Houston, Texas 77056
(713) 625-3500 Fax (713) 625-3535
E-mail: tsiegel@mcgladrey.com

CLE Chair

Melinda L. McAlister

U.S. Trust, Bank of America
700 Louisiana, 6th Floor
Houston, TX 77002
(713) 247-7411 Fax (713) 247-7878
E-mail: Melinda.mcalister@ustrust.com

Membership Chair

Jeff Shkolnick, CFP

Texas Advantage Insurance Brokerage
6363 Woodway, Suite 710
Houston, TX 77057
(713) 532-1000 Fax (713) 532-1199
Email: jeff@texas-advantage.com

Past President

Jerry W. Guillott, CPA

BDO USA, LLP
2929 Allen Parkway, 20th Floor
Houston, TX 77019
(713) 407-3830 Fax (713) 407-3100
Email: jguillott@bdo.com
Assistant: Stephanie Riley
Email: sriley@bdo.com

www.hbepc.org

Greetings Fellow Council Members!

Well, the 2015-2016 membership year has arrived and you know what that means! Please take a moment to complete the enclosed form and return it with your **annual dues payment by September 15th**.

We will continue to meet at River Oaks Country Club, and our dues will remain at \$320. Your form and check should be mailed to Terri Siegel. Her address is found on this letter (to your left) and also on the attached dues form. Please be sure to include your email address since we will again be using the website exclusively for meeting notices and other communications.

Andrew Gardener is our Vice President this year, and he is in charge of speakers. He is currently scheduling another outstanding line-up of speakers. Details will be provided shortly on the website (link at bottom left of this page).

Our annual membership drive will commence in November this year. Our Membership Chair and new board member, Jeff Shkolnick, will be contacting you later this year to initiate the 2016 membership campaign. Please give thought to appropriate nominations for membership. Membership criteria are in our Bylaws which can be found on our website.

Our guest and non-active senior fees this year will increase to \$60 per guest to cover the guest's costs. Guest and non-active senior fee checks should be mailed to Terri Siegel prior to each meeting.

As a reminder, our first meeting will be a joint meeting with the Houston Estate and Financial Forum on Friday, September 25, 2015. The location will be the Junior League. As always, the meeting will feature UT Professor Stanley Johanson as our speaker. Future meetings (at River Oaks Country Club) are scheduled for October 15, November 19, January 28 (evening meeting), February 18, March 24, and April 27. All of our meetings (except January) are scheduled during the lunch hour (people generally start arriving at 11:30 a.m. and each meeting adjourns shortly after 1:00 p.m.). Please note that the January 28th meeting will begin at 5:30 p.m. (adult beverages will be provided). Our Social this year is still being planned, so keep tuned for more information.

In an effort to be less wasteful, we will post outlines on the website prior to the meetings. You may print these or access them electronically. We will still provide some paper outlines at the meeting, but hope to reduce the number over time.

I'm looking forward to an informative and interesting year!

Martie Herrick
President

**HOUSTON BUSINESS & ESTATE PLANNING COUNCIL
DUES NOTICE**

(please pay by September 15, 2015)

NAME: _____

FIRM: _____

YEAR JOINED COUNCIL: _____

EMAIL ADDRESS: _____

PLEASE NOTE: HBEPC is now partially "paperless." If you do not provide an email address, you will not receive the monthly meeting reminder.

Please update the following information if it has changed in the last year:

ADDRESS: _____

CITY, STATE, ZIP CODE: _____

PHONE (include Area Code): _____

FAX (include Area Code): _____

Please complete the following information:

DESIGNATION: Attorney CPA Trust Officer
 CLU, CFP, ChFC, CFA, CBVE-ASA, CVA, AVA, CBA, CPA/ABV

MEMBERSHIP STATUS: Active Member Existing Senior Member* (age 65 and over)

DUES FOR SEPTEMBER 1, 2015 TO MAY 31, 2016 (check appropriate box):

Active Member (all types under age 65): \$320.00

Senior Member* (age 65 and over): \$ 75.00

* Members who were at least 65 by August 16, 2009, and who are already senior inactive members, may retain Senior Member status and pay only \$75 a year plus a \$60 meal charge for each meeting attended. **This Senior Member inactive status is not available to existing members who have never previously elected this status.**

MAKE CHECKS PAYABLE TO: **HOUSTON BUSINESS & ESTATE PLANNING COUNCIL**

Mail form and check to: Terri Siegel
 McGladrey, LLP
 1400 Post Oak Blvd, Suite 900
 Houston, Texas 77056

PLEASE NOTE THAT GUEST FEES ARE \$60 PER GUEST AND CHECKS SHOULD BE MAILED TO THE ABOVE ADDRESS PRIOR TO THE MEETING!

We will post the outline on the website at least 24 hours prior to the meeting so that you can download or print your own copy. If you want us to continue to provide a written copy, please indicate below.

_____ Please provide a handout for me at the meeting.