

Houston Business & Estate Planning Council

August 3, 2026

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Dear HBEPC Members,

I hope this letter finds you well. On behalf of the Board, we look forward to a 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 2027 at the Junior League of Houston, and we will, once again, be educated and entertained by Professor Samuel Donaldson at the Georgia State University College of Law.

We are excited to present this year's outstanding speaker list, covering timely and diverse topics. Although our meetings generally take place on the third Thursday of the month, we have had to move some meetings to other days of the week. Mingling will begin at 11:30, and the speaker presentation will be from noon to 1:00.

- September 17, 2026 – Judge Jerry Simoneaux (A Field Guide to Fiduciary Fumbles, Follies, and Fixes)
- October 15, 2026 – Alexander Eder (Shaping Legacy via Global Mobility)
- November 11, 2026 – Ryan Lessard (Digital Currency Assets 101 and their Investor Outlook)
- January 21, 2027 – Joint meeting with HEFF at Junior League featuring Professor Sam Donaldson
- February 18, 2027 – Jovana Popovich and Amy Allen (Till Death or Divorce Do Us Part: Bridging the Gap Between Family Law and Estate Planning)
- March 18, 2027 – Pam Keever and Stephen A. Cooney (All Things Real Estate and Current Case Studies)
- April 22, 2027 – Mike Day and Bryn Poland (How Family Law and SNT's Work Together)
- 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 you are not receiving these notices, please contact our Secretary, Jon Adinolfi (his 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 membership dues will remain at \$475, and guest fees will remain at \$75 per meeting. **We encourage you to renew your membership online (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 18, 2026.**

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,



Celeste C. Lawton
President