

# Houston Business & Estate Planning Council

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August 12, 2025

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[www.hbepec.org](http://www.hbepec.org)

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 meeting at the River Oaks Country Club.

In order to sustain our membership numbers, we strive each year to welcome a handful of new members. Please give some thought to professionals you know who have been practicing in their field for six years or more and would make a positive contribution to HBEPC, and invite them to apply in January. We welcome estate planning-related professionals who are attorneys, CPAs, CTFAs, CLUs, valuation professionals, and trust officers. Further details are listed on the application form found on our website ([www.hbepec.org](http://www.hbepec.org)).

Our joint meeting with HEFF will take place in January 2026 at the Junior League of Houston, and we will, once again, be educated and entertained by Professor Samuel Donaldson of the Georgia State University College of Law. In March, rather than an evening meeting as we have held the past few years, we will meet at our usual time, 11:30 to 1:00.

We are excited to present this year's outstanding speaker list, covering timely and diverse topics. Our meetings generally take place on the third Thursday of the month. Mingling begins at 11:30, with the speaker from noon to 1:00.

- September 18, 2025 – W. Cameron McCulloch Jr. (fiduciary litigation topic)
- October 16, 2025 – Prof. Eric Reis (I (Don't) Guarantee It: Potential Problems With the Use of Personal Guarantees to Back Loans to Family Trusts)
- November 20, 2025 – Dan DiLella and Kyle Campbell (insurance topic)
- January 23, 2026 – Joint meeting with HEFF at Junior League featuring Professor Sam Donaldson
- February 19, 2026 – Jeff Chadwick (Planning for Clients Who Might Have a Taxable Estate)
- March 19, 2026 – lunchtime meeting, topic TBD
- April 16, 2026 – Kelley M. Bentley (special needs planning)
- May (TBD) – Annual Social – It's a Party!

Notices for the meetings will continue to be sent via email two weeks prior to the meeting date. If you are not receiving these notices, please contact our Secretary, Tanya Castro (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 membership dues will remain at \$475, but guest fees will now be \$75 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 19, 2025.**

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,

A handwritten signature in blue ink, appearing to read "Sarah A. Snook". The signature is fluid and cursive, with the first name "Sarah" being more prominent.

Sarah A. Snook  
President