



National Association of
Estate Planners & Councils

2019 – 2020 OFFICERS

President

Jeffrey G. Barbour, CPA
Brown Edwards
319 McClanahan Street, SW
Roanoke, VA 24014
(540) 345-0936
jbarbour@becpas.com

Vice President

Donna Lynch
TCV Trust & Wealth
Management
204 S. Jefferson Street, Ste 200
Roanoke, VA 24011
(540) 343-1500
dlynch@tcva.com

Secretary

Michael R. Bell, CPA
Anderson & Reed, LLP
1515 Franklin Road, SW
Roanoke, VA 24016
(540) 344-4333
mikeb@andersonreed.com

Treasurer

Luke Young
American National Bank and
Trust Company
3000 Ogden Road
Roanoke, VA 24018
Youngl@amnb.com

Immediate Past President

Manly H. Aylor, Jr., CLU®
Northwestern Mutual
327 King George Avenue
Roanoke, VA 24016
(540) 777-5014
manly.aylor@nm.com

Mailing Address

Michael R. Bell, CPA
Anderson & Reed, LLP
1515 Franklin Road, SW
Roanoke, VA 24016

Website

www.rvepc.org

MEMBER:

NATIONAL ASSOCIATION
OF ESTATE PLANNERS &
COUNCILS
www.naepc.org

ROANOKE VALLEY ESTATE PLANNING COUNCIL

September 2019

Dear Member:

It's that time of year again! The first meeting of the Roanoke Valley Estate Planning Council is just around the corner, and your Board is already busy lining up an outstanding year of programs. Your dues to the Roanoke Valley Estate Planning Council help you keep current on the most recent developments affecting estate planning and your profession. The meetings also provide an opportunity to network with other estate planning professionals and to enjoy Roanoke's finest dining at the Shenandoah Club. Please return your dues payment promptly, and consider asking an associate in your firm or a colleague of yours to join.

Roanoke Valley Estate Planning Council Dues Notice:

Annual Dues* \$180.00

*Includes reception and dinner at each meeting for the member and at the Annual Meeting in May for the member's spouse or guest as well.

DUE UPON RECEIPT OF THIS INVOICE

Please remit payment to:

Roanoke Valley Estate Planning Council
c/o Luke Young
American National Bank and Trust Company
3000 Ogden Road
Roanoke, VA 24018

Please indicate the name(s) of the individual(s) the dues are for with the payment. *New Member Fee of \$50.00 due in addition to the Annual Dues for new members whose applications have been received and accepted for membership.*

All meeting notices and your confirmation of attendance will be conducted by e-mail or via our website www.rvepc.org. If you wish to receive your notices at a different e-mail address than the one used for this notice, please let us know by e-mail so that we may update our records.

Program dates and speakers are tentatively scheduled as follows:

October 1 - **Ken Farmer**; joint meeting with WVACGP

November 5 - **Bill Keller** with Wells Fargo

February 4 - **Michele McKinnon**; joint meeting/CLE event with the RBA

December 4 – **Holiday Social**; Cabo Fish Taco and Mill Mountain Theatre

March 3 - **Elie Foy** with Womble Bond

May 5 - **Shaleen Powell** with Roanoke Cultural Endowment

RSVP Policy for 2019-20 Year:

Members planning to attend a meeting must RSVP at www.rvepc.org or to Jessi Eagle with Anderson & Reed, LLP by 4 p.m. on the Friday before the Tuesday meeting date. Jessi may be reached at jessie@andersonreed.com. If no RSVP is received by that Friday, the member who attends will be assessed a \$35 late registration fee. If an RSVP is made but is not canceled by similar email notice by 4 p.m. on the Friday prior to the Tuesday meeting and member fails to attend (and the absence is not unavoidable), member who fails to attend will be assessed a late penalty of \$35. We are advising you of this policy at the beginning of the year and with each meeting notice in order to improve our reservation experience with the Shenandoah Club.

Guest and New Member Policy for 2019-20 Year:

Members are encouraged to bring guests. The guest fee is \$35. If a guest is eligible for membership and an application that is ultimately approved is received by the Secretary within 30 days or by the next scheduled meeting date (e.g., November 5th in the case of the October 1st meeting), then the guest fee will be waived (or, if already paid, refunded). New members joining after the November 5th meeting will be charged the \$50 New Member fee plus \$115 Dues for the remainder of the meeting year.

We have great programs planned for this coming year and look forward to seeing you there! Please mark your calendars for the year.

Remember to invite a potential new member as a guest for one of the first two meetings!

Accountants

Life Underwriters

College Development Officers

Attorneys

Trust Officers