



National Association of
Estate Planners & Councils

2024 – 2025 OFFICERS

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MEMBER:

NATIONAL ASSOCIATION

OF ESTATE PLANNERS &

COUNCILS

www.naepc.org

ROANOKE VALLEY ESTATE PLANNING COUNCIL

Membership Renewal Notice

September 9, 2025

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 or a colleague to join.

Roanoke Valley Estate Planning Council Dues Notice:

Annual Dues*	<u>\$180.00</u>
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*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.

We will start the social portion of our meetings at 5:30 and begin dinner at 6:00.

Due upon Receipt of this Invoice

Please remit payment to:

Roanoke Valley Estate Planning Council

c/o Daniel Colston

P.O. Box 12154

Roanoke, VA 24023

PLEASE INDICATE THE NAME 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 will be as follows:

October 7 – Kit Mac Nee, CFP, CRPC, AEP – “Strategies to Preserve the Family Legacy: How do you talk with your family about money and values?”

November 4 – Carter Brothers, Jeff Barbour & Jim Pearman – “Confused by OBBB? Then oh BABBBY do we have a presentation for you!”

February 3 – TBD

March 3 – Jim Hefferan – “Name, Image, Likeness (NIL) and College Athletes: What Estate Planners Need to Know”

May 5 - Ashley Webb - Historical Society of Western Virginia, Virginia American Revolution 250 Commemoration

RSVP Policy for 2025-2026 Year:

Members planning to attend a meeting must RSVP via our website at www.rvepc.org or to Ray Juidici, at rjuidici@nbbank.com by 4 p.m. on the Friday before the Tuesday meeting date. 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, and to cover our direct costs.

Guest and New Member Policy for 2025-2026 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 (November 5th in the case of the October 1st meeting), 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 dates listed above.

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