

# *Indian River*

## ESTATE PLANNING COUNCIL

### 2018 – 2019 IREPC Calendar

10/19/2018

**Thursday, Nov 1, 2018**

**5:15 – 7:00 pm**

**Speaker – Shaun McClung, CPA**

**CBIZ CPAs**

**Topic – 2018 Income Tax Update for Estate Planners**

**Location – Quail Valley Boathouse**

**Dinner Sponsor – Gould Cooksey Fennell PLLC**

**Thursday, Jan 10, 2019**

**5:15 – 7:00 pm**

**Speaker – R. Lee McElroy IV, Esquire**

**Downey McElroy PA**

**Topic -Co-Fiduciary Liability**

**Location – Quail Valley Boathouse**

**Dinner Sponsor – PNC Wealth Management**

**Thursday, Feb 28, 2019**

**5:15 – 7:00 pm**

**Speaker – Jeff Wolken**

**Wilmington Trust**

**Topic – Planning in a Low-Interest Rate Environment**

**Location – Quail Valley Boathouse**

**Dinner Sponsor – Wilmington Trust**

**Tuesday, Apr 23, 2019**

**8:00 – 9:00 am**

**12<sup>th</sup> Annual Pinnacle Award Breakfast**

**Location - Quail Valley Waterfront Dining**

**Tuesday, May 7, 2019**

**5:15 – 7:15 pm**

**PGIRC/IREPC Joint Council Meeting**

**Presenters:**

**Jane Dunlap Callahan, Shareholder, Dean Mead/Attorneys at Law**

**Jeffrey R. Pickering, President and CEO, IRCF**

**Adam Logeman VP Stewart Management Group/VP Motor City Classic Cars**

**Topic – Accepting Unusual Gifts**

**Location - Quail Valley Boathouse**

**Dinner Sponsor – Indian River Community Foundation**