

## David A. Maschino, ASA, President, HHEPC - 2018/2019

It is a privilege to wish all the Members of the Hoosier Hills Estate Planning Council a happy Thanksgiving. Hard not to smile when I think of the escapades of John Candy and Steve Martin in the classic "Planes, Trains, and Automobiles" and how blessed we are to be surrounded by our family, friends, and loved ones. May your travels be safe, just not as adventurous!

Our next Member meeting will be held December 6<sup>th</sup> at Zaharako's in Columbus. Certain you will enjoy the carved oak & stained glass that adorn this 1900 ice cream parlor and museum. We have two outstanding speakers lined up: Mr. Lance Like of the Like Law Group and Ms. Mary Elftman of the Marion County Department of Veterans Affairs. Lance's program will address Estate Planning with retirement assets. Mary's presentation will address veteran benefits. I've no doubt the information provided will aid you in serving your clients.

Please mark your calendars for our Member meeting scheduled for February 21, 2019 to be held at Nashville's Salt Creek Golf Course. We have two outstanding programs in the works. Mary Jovanovich of Schwag Charitable will present a program captioned "Charitable Planning Strategies in a new giving environment". Our own Isabel Santer of BKD will discuss Tax Reform.

As I mentioned in my last letter, member retention and recruitment of new members are the life blood of any professional association. Every Member is reminded that their guests may attend one luncheon annually at no charge. Award of C.E. credit is subject to a nominal charge. Please make every effort to reach out to your colleges and other professionals and bring them to our meetings. You may bring as many guests as you wish. Be sure to provide the number and name of each guest at the time of your reservation with Kathlene McConahay. Zaharakos on December 6<sup>th</sup> is a wonderful location to bring your first guest. If we can't attract new members with our continuing education programs, maybe we can lure them in with ice cream!

It is my pleasure to announce that your Board of Directors has decided to hold an Estate Planning Day tentatively scheduled for May 16, 2019. We are in need of volunteers who are willing to assist with logistics, advertisement, and promotion of this event. Please contact your Vice President, Mr. Steve Boltz, to explore how you may contribute to its success. The Board of Directors will be working diligently in planning the educational programs and outreach to other professional organizations. With our combined efforts we can make the Estate Planning Day a must attend event by estate and financial planning professionals throughout the state. We are actively seeking volunteers willing to share their time and talent as contributing speakers. If you have interest in preparing a program and speaking as part of the Estate Planning Day, please contact Lora Mount or myself to discuss. Your participation and contributions are greatly appreciated.

Please remember that we are looking for volunteers to submit articles of interest to our newsletter! Please use this as a platform to share your insight and thoughts regarding issues that you deem important. Please contact Cheyenne Riker to explore what articles or issues you desire to address. Thank you in advance for your contribution to this outstanding and talented estate planning Council!

I look forward to seeing as many of you as possible at the next Council meeting. May blessings be upon you and your family as we enter the Thanksgiving and Christmas holiday seasons. Best regards, Dave