



HOOSIER HILLS ESTATE PLANNING COUNCIL

Fall 2023

www.hhepc.org

BOARD OF DIRECTORS

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Jessica Merkle
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Gretchen deWeber

Renew your
membership [here](#)

ARTICLE:

*[IRS Issues Proposed
Regulations for the
Present Value Of Estate
Tax Deductions, Estate
Administration](#)*

By Martin M.
Shenkman, CPA/PFS,
MBA, JD, AEP®
(Distinguished)

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Dear Members,

I hope that you have enjoyed our Indiana summer. Thank you for your patience in our efforts to start another great year as your Hoosier Hills Estate Planning Council board members. We all look forward to promoting cooperative efforts among all professionals in the field of estate planning represented by you, the members, while always keeping in mind the best interests of our clients.

First, I would like to let everyone know that our infamous Kathleen McConahay has retired. She has been a quintessential piece of HHEPC for more than 30 years. We will miss her greatly and are so appreciative of all that she has done for us for so long. Please feel free to send her a message when you have a moment, her email is, kmccconahay@yahoo.com.

Secondly, I would like to express thanks to Erin Martoglio for serving on our board in multiple roles, as well as being our board President during part of the Covid Pandemic. Thank you, Erin, for helping us carry on through such challenging times!

Third, thank you to those currently serving on our board: Tara Ali (secretary), Sarah Burgess (treasurer), Theresa Claire, Joel Schneider, Aileen Wenzel, and Jessica Merkel. And would you please welcome our new administrator, Gretchen deWeber! We were fortunate to find her, and she has been a great addition to our team. I am grateful to all of you for your participation and contributions!

Next, please take a moment to check your membership account status on the HHEPC site, and renew your membership, if needed. You can easily check [here](#).

The last reminder is to be sure to register for our Thursday, September 21st seminar [here](#), if you have not already done so. Sarah Burgess will be providing a Tax Update: What Advisors Should Know. We are meeting at the Salt Creek Golf Retreat, 2359 State Road 46 East, Nashville, IN 47448. Lunch will start at noon with the seminar to follow from 12:30-2:30pm.

Mark your calendars for September 21, 2023.

**Sarah Burgess will present
Tax Update: What Advisors Should Know**

Lunch at noon with the seminar following 12:30pm-2:30pm.
Register [here](#).

Two hours CE is pending.
See biography and outline [here](#).