

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

Since our last meeting in December, we have survived the Christmas and New Year holidays, the longest partial government shut down in history, and brutally cold temperatures! Welcome to Indiana! If your business is anything like my own, you were more than ready for people to get back to work. I've not been disappointed. I wish your 2019 to be productive and prosperous!

Our next Member meeting will be held February 21<sup>st</sup> at Salt Creek Golf Retreat in Nashville. We have two outstanding speakers lined up: Ms. Isabel Santner BKD and Ms. Mary Jovanovich of Schwab Charitable. Ms. Santner will provide us an informative update on tax issues and the Tax Cuts and Jobs Act. Ms. Jovanovich will discuss Charitable Planning Strategies in a new giving environment. I've no doubt the information provided will aid you in serving your clients. Please bring a guest to this program. 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 Kathleen McConahay.

Please mark your calendars for our **Estate Planning Day** to be held **May 9<sup>th</sup>** at the **Monroe Convention Center**. Your Board of Directors has lined up an excellent program qualifying for six hours of continuing education credits. There are numerous sponsorship opportunities for which we are hopeful you will take full advantage. More details will be released shortly. As marketing is always a challenge, please spread the word to your peers and other professional organizations. Erin Martoglio has taken on the monumental task of advertising. Please reach out to her to share any recommendations and contacts you may have to ensure we reach the widest possible audience. This is a wonderful opportunity to recruit new members.

We are in need of volunteers who are willing to assist with logistics and promotion of this event. Please contact your Vice President, Mr. Steve Boltz, to explore how you may contribute to its success. With our combined efforts we can make the Estate Planning Day a must attend event by estate and financial planning professionals throughout the state.

Thank you in advance for your support and sponsorship of the Estate Planning Day!

Hope to see as many of you as possible on February 21st. Until then, stay warm, be prosperous, and God Bless you and your families.

Best regards,

Dave