



LEAVE A LEGACY[®]

TREASURE COAST

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NEWS

Fall 2005

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SAVE THE DATES 2005 – 2006

November 17, 2005, 1 – 4 pm

Indian Riverside Park, Jensen Beach

The Ultimate Estate Planning Process Workshop ***Sponsored by Hibiscus Children's Center***

Presenter – E. G. 'Jay' Link, president, Family Wealth Counselors of America, Inc., Indianapolis, IN

Founder of Family Wealth Counseling movement and author of "Family Wealth Counseling – Getting to the Heart of the Matter"

Mr. Link is considered one of the foremost experts on issues and strategies relating to wealthy families and often quoted in national press. He is a popular and compelling public speaker within the legal, financial and nonprofit industries.

Cost: \$25 includes materials and book. Refreshments will be served. Three hours of Educational credits are available

This will take the place of Treasure Coast Planned Giving Council / LEAVE A LEGACY[®] & Association of Fundraising Professionals monthly meeting

RSVP to: Glenna DeMichael @ gdemichael@hcc4kids or call 334-9311 ext 404 at the earliest.

January 27, 2006, 8:00 – 9:30 am

Willoughby Country Club, Stuart

Joint monthly meeting of the Treasure Coast Planned Giving Council / LEAVE A LEGACY[®], Association of Fundraising Professionals and Martin County Estate Planning Council. CEU credits available.

Presenter - Julie K Kwon, J.D.

Member of the Wealth Management Group at Bernstein Investment Research & Management. Ms. Kwon advises private clients on investment strategies for optimizing wealth transfer to family members and charities, focusing on tax-efficient wealth management and asset allocation decisions. She earned her J.D. degree from Yale Law School.

Members - \$15.00; Guests - \$20 Breakfast will be served.

RSVP to: Ellen Peitz @ epeitz@hpsfl.org or call 221-4053 ext 235 by January 23

CELEBRATING APRIL 2006 AS LEAVE A LEGACY MONTH
a special event on Wednesday, April 26, 2006, 2 – 6 pm
Hutchinson Island Marriott Resort.

- ❖ two general sessions with keynote speakers
- ❖ three simultaneous educational tracks to choose from
- ❖ CEU credits available
- ❖ Sponsorship levels available

For Information Contact: Kathy Millier at millierkm@bernstein.com or call 561-820-2167
Lynne Spraker at lspraker@aol.com or call 772-220-0212

LEAVE A LEGACY® thanks its strategic partners for their support



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Treasure Coast Chapter



Board members at Elliott Museum reception and installation: Robin Hicks-Connors, CFRE, immediate past president; Kathleen Millier, vice president – education; Glenna DeMichael, president; Ellen Peitz, vice president – communications; and Bonnie Ares Royster, CFRE, vice president - membership

If you are interested in receiving more information on becoming a LEAVE A LEGACY® strategic partner to help support planned giving awareness, please contact: Glenna DeMichael at gdemichael@hcc4kids.org or call 334-9311 ext 104