

Objective and Nature of the Council

The objectives of the Council are:

To promote cooperative efforts in the field of estate planning among the professions and businesses represented by its members.

To assist its members in keeping abreast of laws and other developments in the field of estate planning through meetings and the dissemination of information so as to continuously improve the estate planning services provided by its members.

To promote respect for, and an understanding of, the relationships and functions in the field of estate planning of the professions and businesses represented by its members.



Lake Michigan Estate Planning Council

c/o Kathy Byma, Novotny CPA Group

800 E. Ellis Rd., #584

Norton Shores, MI 49441

Phone: (231) 728-5176, Press 4 Email:

kathy@novotnycpagroup.com

Lake Michigan Estate Planning Council

Invitation To Membership

Lake Michigan Estate Planning Council

2018-2019 Board of Directors

David Waterstradt

david@davidwaterstradt.com

President

231-773-1169

Alistair Lynch

alynch@fbinsmi.com

Vice-President

231-777-7600

Kathy Byma

kathy@novotnycpagroup.com

Treasurer

231-728-5176 Press 4

Maureen Brading

maureen@myfocusfinancial.com

Secretary

231-739-5751

Membership Roster

A roster of the membership of the Council listing the names, addresses, discipline, and the telephone number of the current members, and segregated by membership groups is distributed to each member each year.

Membership Dues

Annual membership dues are \$60, which includes your admission to our four membership events per year, with the exception of other expenses, which may include, but not limited to dinner, golf, theatre tickets, etc.

Guests are always welcome to come to events at an additional charge.



Lake Michigan Estate Planning Council Membership Application

Name: _____

Company: _____

Address: _____

City: _____ State: _____

Phone: _____ Fax: _____

E-mail: _____

Business Professional History: (Briefly summarize the past 5 years of your business and professional career—attach separate page if necessary)

Civic/Community Activities—attach separate page if necessary:

I understand all of the membership qualifications listed in this brochure and hereby certify that I fulfill these membership requirements of the Lake Michigan Estate Planning Council (LMEPC).

Applicant Signature _____

Date _____

Membership Qualifications

Members of the Lake Michigan Estate Planning Council consist of persons who are interested in and actively practicing estate planning in Western Michigan, and who are actively practicing in one of the following professions or businesses: (each profession is limited to 15 voting members)

Please check which apply:

- _____ Attorney
- _____ Certified Public Accountant
- _____ Certified Financial Planners and Investment Advisors
- _____ Trust Officer
- _____ Members of nonprofit organizations or Chartered Life Underwriters, Chartered Advisors for Senior Living, Funeral Directors or similar licensed financial sales professional.

Application Process

Complete the membership application as directed. Your application will be reviewed by the Board of Directors at the next board meeting for approval. Approval is considered by the fact that membership must consist of persons from each of the five groups, which include Attorney, Certified Public Accountant, Chartered Life Underwriter, Trust officer, Financial advisor, Member at large and an Associate member. No one group may exceed one-third of the total membership. At that time you will be notified and invoiced for the \$60 annual membership dues.



**Working Together to Help Families Preserve Their Wealth
During and After Their Lifetime**