ECEPC
Essex County
Estate Planning Council

2017-2018 Schedule of Events*

Sept. 28	**Breakfast Meeting** /Spinelli's of Lynnfield Topic: Elder Abuse: What Is It and How Do We Respond? Speakers: Joanne MacInnis, RN, Aberdeen Home Care, Inc. Renee Gauthier, Protective Service Program Manager, SeniorCare, Inc.
Oct. 16	**Lunch Meeting** /Location TBA Topic: Special Needs Planning Speakers: Caleb Harty, Harty Financial Attorney Vincent E. Bonazzoli, Family Estate Planning Law Group Terasa M. Marshall, CPA, Anthony & Dodge
November	**Breakfast Meeting** /Spinelli's of Lynnfield Topic: Year-End Tax Planning Speakers: Jerry Mahan, CPA, Moody, Famiglietti & Andronico Ryan J. Swartz, McLane Middleton
December	**Lunch Meeting** /Location TBA Topic: Technology: Identification Theft and Protection Speaker: TBA
January	**Breakfast Meeting** / Spinelli's of Lynnfield Topic: 2018 Economic Forecast Speaker: Mark Luschini, Chief Investment Strategist, Janney Capital Management
February	**Lunch Meeting** /Location TBA Topic: TBA Speaker: TBA
March	**Breakfast Meeting** /Spinelli's of Lynnfield Topic: Update on Environmental, Social and Governance Investing Speaker: TBA
April	**Networking Event**/Local Brewery TBA Topic: Networking and AEP Information Session
May	**Breakfast Meeting/**Spinelli's of Lynnfield Topic: Multigenerational Planning Speakers: Bob Clark, Janney Montgomery Scott, LLC Ron Nakamoto, Empowered Wealth
June	**Annual Dinner/**Tupper Manor, Beverly

*Note – Dates and speakers are subject to change; additional meetings may be added. Unless otherwise noted, Breakfast Meetings start at 7:30am; Lunch Meetings will begin at noon.