

		<p>Joining East Valley Estate Planning Council for \$250 provides at least \$420 in direct benefits, if you include the price of the breakfast and the cost of gathering professional quality CE programming:</p> <p>7 Breakfast meetings - \$245 7 hours of Continuing Education - \$175</p>
EVEPC	Presentations Historical Summary	<p>When you include the value of meeting new contacts, connecting with your peers to solve issues or confer on mutual client news, the membership value increases.</p> <p>When you use the website to access a past handout, locate an address or e-mail, and reach out to the community as a whole, the membership value increases. Don't miss the 2015/2016 season: Join today!</p>
2015/16 EVEPC Season at a Glance		
2016 May	IRA Trusts Matthew Dana 25 people replied to meeting surveys: main room for improvement noted too much time at the beginning of presentation reminiscing	<ul style="list-style-type: none"> • <i>Excellent!</i> • <i>I gained value from the presentation</i>
2016 Mar	Forensic Accounting in Trust and Probate Cases-Where did the Money Go? Julia Miessner 24 people replied to the meeting surveys: main room for improvement noted presenters should talk to the audience and not read from the screen.	<ul style="list-style-type: none"> • <i>Very interesting topic</i> • <i>Learned at least one useful or new thing from the presentation</i>
2016 Feb	Incentives and Dis-Incentives in Trusts Greg Furseth and Mark Bregman 24 people replied to meeting surveys: no comments noting need for improvement	<ul style="list-style-type: none"> • <i>Great overview!</i> • <i>Excellent!</i>
2016 Jan	Estate Planning for Non Taxable Estates Lou Silverman and Kristel Patton 26 people replied to meeting surveys: the only room for improvement noted the kitchen needs to improve food service.	<ul style="list-style-type: none"> • <i>Excellent-basic but very helpful</i> • <i>Kristel Patton has great energy!</i>
2015 Nov	Estate Planning for the Modern Family Kathie Gummere 26 people replied to meeting surveys: main room for improvement noted the use of more than a flowchart to organize presenter thoughts and outcomes.	<ul style="list-style-type: none"> • <i>Topic was useful and relevant</i> • <i>Presenter was knowledgeable</i>

2015 Oct	International Estate Planning Prescott Pohl, JD	<ul style="list-style-type: none"> <i>Great presentation! Great topic!</i> <i>Excellent-good handout</i> <i>Best presentation EVEPC has ever had!</i>
	30 people replied to meeting surveys: no comments noting need for improvement	
2015 Sep	College---Getting There From Here & Planning for Funding Education Carina Burtell & Rilus Dana	<ul style="list-style-type: none"> <i>Most agreed the presentation was relevant to their practice</i> <i>Most agreed the presentation as planned was easy to follow</i>
	28 people replied to meeting surveys: main room for improvement noted the presentation should have been at a higher level	
2014/15	EVEPC Season at a Glance	
2015 May	ALTCS: What You Need to Know Patricia Barraza	<ul style="list-style-type: none"> <i>Best Presentation I have seen at EVEPC.</i> <i>Topic is something that comes up almost every day in my practice. Great information - very helpful.</i>
	23 people replied to meeting surveys: main room for improvement noted was a preference for more information on strategy, case studies, etc.	
2015 Mar	How to Connect with Your Clients Sara Presler	<ul style="list-style-type: none"> <i>Sara was awesome!</i> <i>Nothing like what I was expecting and very different than what I have seen in the past at these meetings. Would love to see her again!</i>
	37 people replied to the meeting surveys: main room for improvement noted to touch base ahead of time with presenter to confirm AV needs.	
2015 Feb	Planning for A Gift Tax Audit Chuck Inderieden and Gary Ringel	<ul style="list-style-type: none"> <i>Very knowledgeable on gift returns and audits!</i> <i>Great information!</i>
	29 people replied to meeting surveys: main room for improvement noted having two presenters requires pre-planned coordination of the presentation to ensure it is delivered in a professional and seamless way.	
2015 Jan	Securing Retirement with a Home Equity Conversion Mortgage Bill Parker, CPA	<ul style="list-style-type: none"> <i>Very interesting information on a resource not many know about</i> <i>Bill was very knowledgeable</i>
	24 people replied to meeting surveys: the only room for improvement noted low fat milk at breakfast would be nice.	
2014 Nov	Firearms in and Estate – Planning and Distribution Mark Moritz	<ul style="list-style-type: none"> <i>Specialized topic, but relevant.</i> <i>Very engaging speaker!</i> <i>Mark is one of the best!</i>
	30 people replied to meeting surveys: main room for improvement noted was the room was too cold/freezing!	
2014 Oct	IRA Trusts Stephanie Tribe, JD	<ul style="list-style-type: none"> <i>Very substantive - great program</i> <i>Good subject - speaker knowledgeable!</i> <i>Very well spoken and entertaining.</i>
	35 people replied to meeting surveys: noted room for improvement was to use numerical examples of distributions under each scenario	
2014 Sep	Pain in the Assets Marlene Appel	<ul style="list-style-type: none"> <i>Fascinating work experience and stories!</i> <i>Marlene did an excellent job!</i>
	28 people replied to meeting surveys: main room for improvement noted was a request to speakers for learner centric presentations.	

2013/14 EVEPC Season at a Glance			
2014 May	Community Property John Becker	<ul style="list-style-type: none"> <i>Ideal type of presentation—loads of info in handout that I can read later and keep for reference, very valuable!</i> <i>This was a case of a perceived simple topic presented very well and thoroughly. More like this would be great!</i> 	
2014 Mar	Protecting Digital Assets Tisha Diffie	<ul style="list-style-type: none"> <i>She was great!</i> 	
	31 people replied to meeting surveys: main room for improvement noted was that some felt she missed the opportunity to tie her service into the knowledge base of the attendees. Though much of what she does in legwork, it is also something many in the group probably don't want to learn or do. More real life examples and a better flow to the presentation, and possibly an outline, would've made the presentation more dynamic for the group.		
2014 Feb	Portability Lester Law	<ul style="list-style-type: none"> <i>Topic and presentation were challenging and took my knowledge to a higher level, which is what I look for!</i> <i>Lester was fantastic, it would be great if he can present at least once a year!</i> 	
	28 people replied to meeting surveys: main room for improvement noted was that the location is too far for some to commute at that time of the morning due to traffic.		
2014 Jan	Elder Law and Planning for Incapacity Stephanie Bivens	<ul style="list-style-type: none"> <i>Stephanie is a lively presenter and her topic was very timely for today's aging population, which will be the core of the client base for many of us for the coming years. Best Presentation I've attended!</i> <i>Best Presenter Ever. She has set the bar high for all future speakers!</i> 	
	27 people replied to meeting surveys: main room for improvement noted was that some variety in the buffet from month to month would be good.		
2013 Nov	Advising Trust & Estate clients on the New 3.8% Medicare Surtax Mary Jordan & Ryan Boyer	<ul style="list-style-type: none"> <i>They did a nice job!</i> <i>This is a great venue!</i> 	
	27 people replied to meeting surveys: main room for improvement noted was a request for a topic on Estate planning/Estate Administration of digital assets and paperless society.		
2013 Oct	Asset Protection Ike Devji	<ul style="list-style-type: none"> <i>This was one of the best presentations I have attended, great topic and VERY well organized.</i> <i>This gentleman is one of the top two presenters I have seen at these meetings. Please bring him back again!</i> 	
	38 people replied to meeting surveys: noted some room for improvement most people agreed that the discussion focused too much on the need for planning and too little on tools for planning.		
2013 Sep	Update on Estate and Gift Tax Law Wes Scott	<ul style="list-style-type: none"> <i>Wes' presentations are always interesting, well done, pertinent and valuable!</i> <i>Appreciate the annual updates from Wes Scott-Thank you!</i> 	

46 people replied to meeting surveys: main room for improvement noted was that both the handouts and the slideshow were too small to read for multiple people.

2012/2013 EVEPC Season at a Glance

2013 May	Planning for the Smaller Estate Bob Ciancola	<ul style="list-style-type: none"> <i>Very good topic!</i>
2013 Mar	21 people replied to meeting surveys: main room for improvement noted there wasn't any negative/positive feedback noted in the survey results. Community Property Angela Hallier	<ul style="list-style-type: none"> <i>Angela was engaging & extremely knowledgeable. I wish we could have had more time for this topic.</i> <i>Excellent topic. Really learned a lot!</i>
2013 Feb	28 people replied to meeting surveys: main room for improvement noted would have been helpful if the presentation was geared a little more to estate planning. Estate Planning for Retirement Plan Proceeds John Pattullo	<ul style="list-style-type: none"> <i>Excellent materials. John is very knowledgeable on this topic and easy to listen to. Seemed a bit disjointed, but perhaps the early questions through him off of his agenda. Thanks to John for great information!</i> <i>Excellent! Good level of detail.</i>
2013 Jan	41 people replied to meeting surveys: main room for improvement identified there was so much to cover on this topic Exit Strategies for Charitable Remainder Trusts David Walser	<ul style="list-style-type: none"> <i>David is very knowledgeable on this & many topics affecting very high net worth individuals.</i> <i>I have not had to terminate a CRT in my career, but it is nice to know the potential penalties and pitfalls to avoid.</i>
2012 Nov	22 people replied to meeting surveys: main room for improvement identified would have liked power point slides on paper. Wealth Transfer Trends in the New Decade Hugh Magill	<ul style="list-style-type: none"> <i>This speaker really has experience to back his talk/walk. Wish I had his clients.</i> <i>Hugh was a great speaker. Very Interesting.</i>
2012 Oct	25 people replied to meeting surveys: main room for improvement identified handouts that were too hard to read. Every E Survey respondent reported meeting someone new at this event. Using the \$5mm Exemption Equivalent or Losing It Matt Dana	<ul style="list-style-type: none"> <i>Matt Dana is engaging, speaks naturally, is comfortable in front of a group, and obviously knows his stuff</i> <i>I've been to seminars for 25 years; Matt was the best</i>
2012 Sep	26 people replied to meeting surveys: noted some venue room for improvement (sound, lines at bkfst bar), and the need to start the meeting sooner to give speaker ample time to present. 85% of evaluations indicated learning something new, meeting someone new, using a website resource, and finding value for their practice at this meeting. Arizona Income Tax Update Edward Zollars	<ul style="list-style-type: none"> <i>EVEPC always has great speakers.</i> <i>Good insight into the ineffectiveness & lack of understanding of practical tax issues of our state legislators.</i>
	29 people replied to meeting surveys: main room for improvement noted an expectation of meeting handouts, desire to keep presentations closer to estate planning topic impact. On line registrations are up, new linked in group has 30 members. Most responding indicated learning at least one new thing, and meeting one new contact.	

2011/12 EVEPC Season at a Glance

2012 May	The Outlook for the Global Markets Amita Sheth	<ul style="list-style-type: none"> <i>Very articulate with complex topic. Worthwhile subject, while not as much specific benefit to my small practice.</i> <i>Didn't see a handout on the topic, but I found the information useful and the presenter was very clear. I would like to see her return.</i>
	27 people replied to meeting surveys: main room for improvement noted a desire for topics immediately and directly relevant to small estate planning practices, handouts and takeaways are welcome/expected, and a desire for more diversity in the breakfast menu. Again, members reported meeting new contacts, learning at least one useful thing, a greater use of the website for on-line registration and reference, and a desire for a linked in group.	
2012 Mar	Working with Clients Toward Financial Success Theresa Chacopolous	<ul style="list-style-type: none"> <i>Good insight on deepening client relationships and why professional advisors should know as much about clients as possible</i> <i>This speaker is very competent at what she does</i>
	31 people replied to meeting surveys: main room for improvement noted topic selection and topic descriptions. While marketing skills and ideas were requested in past membership topic requests, topics not directly applicable to technical, legal, or fiduciary knowledge don't seem to fit what most members are seeking from EVEPC. Takeaways are/were welcome. Members continued to report meeting new contacts, and a desire for a linked in group.	
2012 Feb	Cross Border Asset Acquisitions Dale Walters	<ul style="list-style-type: none"> <i>Great Information. I learned a lot.</i> <i>Topic is very complex</i>
	30 people replied to meeting surveys: main room for improvement identified some comments about the food and sound system. Most e-survey responses indicated meeting someone new, learning something new, and expanded interest in either an e-letter or linked in group site.	
2012 Jan	To Decant or Not to Decant T. James Lee	<ul style="list-style-type: none"> <i>Attorney Lee changed my mind about decanting. He added a new dimension.</i> <i>Jim is a great speaker. Another topic: Arizona Trust Code</i>
	31 people replied to meeting surveys: main room for improvement identified starting meeting on time, keeping front en announcements short/shortest possible. On Line registrations up. 85% reported learning at least one useful thing this day, and an interest in starting a linked in group emerged.	
2011 Nov	Wealth Transfer Trends in the New Decade Hugh Magill	<ul style="list-style-type: none"> <i>This speaker really has experience to back his talk/walk. Wish I had his clients.</i> <i>Hugh was a great speaker. Very Interesting.</i>
	25 people replied to meeting surveys: main room for improvement identified handouts that were too hard to read. Every E Survey respondent reported meeting someone new at this event.	
2011 Oct	When there Isn't a Will, There's Still a Way Mark Moritz	<ul style="list-style-type: none"> <i>Great New Info on DMV affidavit. Thank you!</i> <i>Mark is Great. Next topic by him: Revocable Trusts...</i>
	23 people replied to meeting surveys: main room for improvement identified desire for more speakers who engage the audience in their topics.	
2011 Sep	IRS Estate Tax Update Wesley Scott	<ul style="list-style-type: none"> <i>Wes is a great speaker. Thanks for bringing him back.</i> <i>Great Speaker for a confusing topic.</i>
	38 people replied to meeting surveys: main room for improvement identified as potentially changing breakfast menu, and noting MCC sound system weakness.	
EVEPC and Premium Organization use an electronic survey option and paper evaluations, to gather responses from those who couldn't make the meeting but wanted to, and to better consolidate the survey responses into useful decision making guides for future programming and additional features that members would want and value. This consolidated summary of member feedback is only possible because of these moves toward greater data capture and automated reporting tools.		

2010/11 EVEPC Season at a Glance

2011 May	Do's and Don'ts for ALTCS Patricia Barraza	<ul style="list-style-type: none">• <i>Great Knowledge about her topic, great resource to know about.</i>• <i>I strongly recommend her as a speaker</i>
2011 Mar	Avoiding Litigation and an Update on Pending Legislation Philip Quindry and Stephen Follett	<ul style="list-style-type: none">• <i>Very Interesting Topic and Qualified Speakers</i>• <i>Great!</i>
2011 Feb	Nuts and Bolts of Charitable Deferred Vehicles Ira Feldman	<ul style="list-style-type: none">• <i>Speaker knows and personally uses the products he discussed.</i>• <i>Ira was excellent - very knowledgeable. His examples were very helpful.</i>
2011 Jan	Ins and Outs of ILITS Melissa Kemp	<ul style="list-style-type: none">• <i>Some great ideas on insurance I had forgotten about.</i>• <i>Melissa is a great speaker, really enjoyed. Needed to give her more time.</i>
2010 Nov	Is it Time to Consider Taxable Giving? Max Boyer	<ul style="list-style-type: none">• <i>Great Topic. Stuff that needs to be discussed with our clients.</i>• <i>Loved the Presentation! Max was great in his presentation style</i>
2010 Oct	Thoughts on Alternative Dispute Resolution Language Thomas Shumard	<ul style="list-style-type: none">• <i>Tom's practical experience and personal knowledge were impressive. War stories quite intense.</i>• <i>Good Information - most I wasn't aware of. Thank You!</i>
2010 Sep	Estate and Gift Tax Legislative Update Wesley Scott	<ul style="list-style-type: none">• <i>Very Down to Earth Style.</i>• <i>As always, Wes makes IRS code understandable in the real world, and gives great practical advice.</i>

Over the Summer, EVEPC and Premium Organization moved to create a new website for EVEPC that would ultimately support a continually improving membership experience. A specific objective was to keep support costs low, while increasing the volunteer board's ability to communicate with current and potential members by easily posting meeting and event information, supporting visibility for sponsors, automating monthly meeting announcements, building a useful membership directory, and developing a base of stored membership and guest information in ways that would allow better decisions about topics, speakers, membership options, pricing, and East Valley practitioner needs and concerns, on a very small budget. There is much room for improvement, but the hardest part: initiating change: has been completed.