I’ve been involved with the East Valley Estate Planning Council since 2008, first as a general member, then as a Board member and officer, and now back to a general member. I value membership in EVEPC for the opportunity to network with other professionals who advise clients on estate and trust issues.

At every meeting, besides earning continuing education credits, I learn something new – it might be a technical trust or estate tax issue, a twist on a charitable planning strategy, “best practices” to avoid litigation when representing trust or estate clients, or something related to insurance or investments.

Although I practice as a tax CPA and don’t draft documents, manage money or sell insurance products, the knowledge I gain from other professionals who practice in those areas helps to make me a better advisor to my clients.

Through my EVEPC membership and attendance at the monthly meetings, I have built relationships with estate attorneys, investment and insurance advisors and other CPAs. It is so gratifying to be able to pick up the phone, call one of these individuals and pick their brain for 5 or 10 minutes on an unusual trust or estate issue facing one of my clients.

Mary C. Jordan, CPA