

**GREATER BOCA RATON ESTATE PLANNING COUNCIL  
Board Meeting Agenda 11/09/21**

- **Welcome/Opening Comments**                      John Clidas
  
- **Approve Minutes  
(10/12/21)**    Sydney Kocher
  
- **Reports**
  - **Treasurer's Report (and  
presentation of 2021 – 2022  
budget)**    Scott Garber
  
  - **Membership**    Blake Betheil
  
  - **Programming**    Bill Miller
  
  - **Events**    Jamie Umberger
  
  - **Sponsorships**    Dan Seigel
  
  - **Technology**    Ross O'Connor
  
- **Other Business**
  - **LISI (Leimberg Information Services) Member Benefit Proposal**
  
- **Adjourn**

**GREATER BOCA RATON ESTATE  
PLANNING COUNCIL MINUTES  
OF THE BOARD MEETING  
October 12, 2021**

1. **Welcome:** This Zoom meeting was called to order by John Clidas, President, at 8:00 a.m. John welcomed all Board members.
2. **Approval of Minutes:** The Board voted to approve the minutes of the September 14, 2021 Board meeting.
3. **Membership.** Blake Bethel, V.P. of Membership, led the discussion regarding membership. Blake presented the applications of potential new members. The applications of Alexander “Zander” J. Retamar, Esq. (for associate membership) and Michael Gisonda were approved. The application of Robert Mullin was presented. His application was lacking a sponsor in the financial category, so Blake will speak with Robert to ensure that he obtains a qualifying sponsor. John requested that the Board take a look at the list of members who have not renewed and to reach out to Blake with the names of individuals that they will contact.
4. **Sponsorships.** Dan Seigel, V.P. of Sponsorships, led the discussion regarding sponsorships. Dan spoke with Lisa Hersch and Julie Clairmont-Shide (via Morgan Stanley) regarding their sponsorship of the November kick-off event. Lisa requested that if she sponsors our virtual kick-off that she also receive some type of recognition at the year-end event. Dan will speak with Julie regarding applying her \$1,000 roll-over sponsorship funds to the kick-off event. Dan will also request that Lisa contribute an additional \$500 in sponsorship funds (to be added to her existing \$500 roll-over funds) for the kick-off event. John Clidas offered to apply Synovus’ \$1,000 of roll-over funds to the kick-off event. Assuming Lisa and Julie are in agreement with this plan, this would provide a total of \$3,000 in sponsorship funds for the kick-off event.

Dan spoke with Andrew Kravit regarding sponsoring the holiday event at the Addison on December 7, 2021. Andrew will agree to contribute \$5,000 for this event, but only if he is a sole sponsor. The balance of the event will be paid for by the Council’s reserve. The Board voted to approve this plan of action regarding the holiday event.

5. **Events:** Jamie Umberger, V.P. of Events, led the discussion regarding events. Jamie and her committee are working to plan the holiday event at the Addison. The total estimated cost of the event will be \$8,000. If a live band is engaged, this could be an additional cost. Andrew Kravit will contribute \$5,000 in sponsorship funds for this event and any remaining expenses will be covered by the Council’s reserve.

Jamie and her committee are working to finalize the details of the virtual chocolate tasting kick-off event. Attendees will pick up their tasting boxes at Hoffman’s the day of the event. Kristina Gregg, Past President, suggested to ask members to drop off canned goods when they pick up their tasting boxes. Kristina can facilitate pick-up of the canned goods.

6. **Treasurer's Report.** Scott Garber, Treasurer, reviewed the Council's financials as of September 30, 2021. The reports reviewed included the Budget vs. Actuals, Balance Sheet Comparison, and Profit and Loss Comparison. The budget will change significantly once adjusted next month and Scott will be able to provide a much more accurate picture of the Council's anticipated expenditures. The Council's expenses thus far this year have been minimal. Scott anticipates that the Council will operate at a balanced budget this season (with zero net income). The Board agreed to defer a vote to approve the proposed budget until the next Board meeting (once we have a better idea of how many members register for the virtual NAEPC conference).
7. **Technology.** Ross O'Connor, V.P. of Technology, led the discussion regarding technology. Ross encouraged the Board to join the Council's social media groups on LinkedIn and Facebook. He also encouraged the Board to reach out to him with any ideas on how to promote online engagement for the purpose of growing our membership.
8. **Programming.** Josh Goldglantz, President Elect, led the discussion regarding programming. He reported that we had approximately 50 attendees at our October dinner meeting. Lou Mezzullo will be presenting at our virtual dinner meeting on November 9, 2021, regarding business succession planning. Josh and Bill Miller, V.P. of Programming, are working on getting CE accreditation for this event. The Council purchased a four-pack of pre-recorded NAEPC webinars. Bill was recently approached by Abby Axelrod-Wunderman who suggested that her organization (the Community Foundation of Palm Beach County) partner with the Council to host one of these virtual events, which could help to boost the Council's visibility. Josh and Bill will explore this idea further and will come up with a proposal. A vote on this item can be taken via email, if necessary. Further, it was suggested that we make the recordings of our dinner meeting presentations available for replay for a limited period (as was done last season). Josh and Bill will work with Ross O'Connor to facilitate these re-plays. Mark Schaum, Director, reported that Travis Hayes through the South County Bar Association will be speaking about the new Community Property Trust Act on November 8, 2021. The Board agreed that this event should be promoted to the Council.
9. **Other Business:**
  - **AEP Designation.** The Board voted to approve John Clidas for the Affiliated Council AEP Nomination. Sydney Kocher and Josh Goldglantz agreed to sign the application on his behalf.
  - **Outstanding Leadership Award Proposal.** John Clidas provided an update to Judi Donoff and told her that he would get back to her with a firm date for the presentation by November 15, 2021. Kristina Gregg will consider potential candidates for this award for this season.
  - **Nominating Committee.** Josh Goldglantz will start reaching out to this committee to discuss board positions for next season.

Board Meeting adjourned at 9:20 am.

Respectfully Submitted,

Sydney Smith Kocher, Secretary

**Attendance Record**

Member	Position	<b><u>Attendance Record</u></b>										
		8/11/21	9/14/21	10/12/21	11/9/21	12/14/21	1/11/22	2/8/22	3/8/22	4/12/22	5/10/22	6/14/22
Clidas, John	President	X	X	X								
Gregg, Kristina	Past President	X	X	X								
Goldglantz, Joshua	President Elect	X	X	X								
Garber, Scott	Treasurer	X	X	X								
Sydney Kocher	Secretary	X	X	X								
Umberger, Jamie	V.P. Events	X	X	X								
Miller, Bill	V.P. Programs	X	X	-								
Seigel, Daniel	V.P. Sponsorships	-	X	X								
Betheil, Blake	V.P. Membership	X	X	X								
O'Connor, Ross	V.P. Technology	X	X	X								
Thierman, Abigail	Director	X	X	-								
Demosthenes, Alexandra	Director	X	-	X								
Coconate, Joseph	Director	X	X	-								
Schaum, Mark	Director	X	X	X								
Geronemus, Leonard	Director	X	X	X								
McCullough, Leslie	Director	-	X	X								
Rosenzweig, Michael	Director	X	X	X								
Roman, Paul	Director	X	X	X								
Singer, Brian	Emeritus	X	X	-								
Cancilla, Debra	Emeritus	X	X	X								
Goldberger, Scott	Emeritus	X	-	-								
Ballerano, Jr., James	Emeritus	-	-	X								
Milhauser, Brad	Emeritus	X	-	X								
	Quorum	15	16	15								
	Total	20	19	18								

**Upcoming events:**

**10/21/2021** – Season Kick-Off Event (Via Zoom)

**11/9/2021** – Dinner Meeting – Speaker: Lou Mezzullo (Via Zoom)

**11/9/2021** – Board Meeting (Via Zoom and at The George Snow Foundation office)

**12/07/2021** – Holiday Party (The Addison)

**12/14/2021** – Board Meeting (TBD)

**1/11/2022** – Board Meeting (TBD)  
**1/19/2022** – Dinner Meeting – Speaker: Richard Warner (Woodfield)  
**2/8/2022** – Board Meeting (TBD)  
**2/8/2022** – Dinner Meeting – Speaker: Larry Rybka (Woodfield)  
**3/8/2022** – Board Meeting (TBD)  
**4/12/2022** – Board Meeting (TBD)  
**4/19/2022** – Dinner Meeting – Speaker: Steve Akers (Woodfield)  
**5/10/2022** – Board Meeting (TBD)  
**??/??/2022** – End of Year Event (date/location TBD)  
**6/14/2022** – Board Meeting (TBD)

Board Meetings start at 8:00 a.m. Council Meetings start at 5:30 p.m. Other events start as indicated.

# Greater Boca Raton Estate Planning Council, Inc.

## Balance Sheet Comparison

As of October 31, 2021

	TOTAL		
AS OF OCT 31, 2021	AS OF OCT 31, 2020 (PY)	CHANGE	
<b>ASSETS</b>			
Current Assets			
Bank Accounts			
104.00 Wells Fargo 1014	89,448.72	100,293.09	-10,844.37
Sponsorship Rollover Dollars	8,500.00		8,500.00
<b>Total 104.00 Wells Fargo 1014</b>	<b>97,948.72</b>	<b>100,293.09</b>	<b>-2,344.37</b>
<b>Total Bank Accounts</b>	<b>\$97,948.72</b>	<b>\$100,293.09</b>	<b>\$ -2,344.37</b>
<b>Total Current Assets</b>	<b>\$97,948.72</b>	<b>\$100,293.09</b>	<b>\$ -2,344.37</b>
Other Assets			
181.01 Advance Payments	2,117.54	2,277.54	-160.00
182.00 Due for Annual Event	0.00	0.00	0.00
<b>Total Other Assets</b>	<b>\$2,117.54</b>	<b>\$2,277.54</b>	<b>\$ -160.00</b>
<b>TOTAL ASSETS</b>	<b>\$100,066.26</b>	<b>\$102,570.63</b>	<b>\$ -2,504.37</b>
<b>LIABILITIES AND EQUITY</b>			
Liabilities			
Current Liabilities			
Other Current Liabilities			
201.00 A/P	0.00	0.00	0.00
301.00 Dues in Advance	0.00	0.00	0.00
303.00 Sponsorship in Advance	0.00	0.00	0.00
311.00 Accounts Payable	0.00	0.00	0.00
<b>Total Other Current Liabilities</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Total Current Liabilities</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Total Liabilities</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
Equity			
30000 Opening Balance Equity	0.00	0.00	0.00
32000 Unrestricted Net Assets	70,234.16	94,646.19	-24,412.03
Net Income	29,832.10	7,924.44	21,907.66
<b>Total Equity</b>	<b>\$100,066.26</b>	<b>\$102,570.63</b>	<b>\$ -2,504.37</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$100,066.26</b>	<b>\$102,570.63</b>	<b>\$ -2,504.37</b>

Greater Boca Raton Estate Planning Council, Inc.

Budget vs. Actuals: FYE 6-31-22 - FY22 P&L

July - October, 2021

	JUL 2021			AUG 2021			SEP 2021			OCT 2021			TOTAL		
	ACTUAL	BUDGET	OVER BUDGET	ACTUAL	BUDGET	OVER BUDGET	ACTUAL	BUDGET	OVER BUDGET	ACTUAL	BUDGET	OVER BUDGET	ACTUAL	BUDGET	OVER BUDGET
<b>Income</b>															
501.00 Dues	2,550.00	5,250.00	-2,700.00	2,100.00	5,250.00	-3,150.00	11,700.00	5,250.00	6,450.00	19,500.00	5,250.00	14,250.00	\$35,850.00	\$21,000.00	\$14,850.00
502.00 Sponsorships													\$0.00	\$0.00	\$0.00
502.10 Diamond Sponsor		2,083.33	-2,083.33		2,083.33	-2,083.33		2,083.34	-2,083.34		2,083.33	-2,083.33	\$0.00	\$8,333.33	\$ -8,333.33
502.30 Gold Sponsor	3,000.00	250.00	2,750.00		250.00	-250.00		250.00	-250.00		250.00	-250.00	\$3,000.00	\$1,000.00	\$2,000.00
502.40 Silver Sponsor	500.00	625.00	-125.00		625.00	-625.00		625.00	-625.00		625.00	-625.00	\$500.00	\$2,500.00	\$ -2,000.00
502.50 Bronze Sponsor		166.67	-166.67	500.00	166.67	333.33		166.66	-166.66		166.67	-166.67	\$500.00	\$666.67	\$ -166.67
<b>Total 502.00 Sponsorships</b>	<b>3,500.00</b>	<b>3,125.00</b>	<b>375.00</b>	<b>500.00</b>	<b>3,125.00</b>	<b>-2,625.00</b>		<b>3,125.00</b>	<b>-3,125.00</b>		<b>3,125.00</b>	<b>-3,125.00</b>	<b>\$4,000.00</b>	<b>\$12,500.00</b>	<b>\$ -8,500.00</b>
506.00 Drink Tickets		16.67	-16.67		16.67	-16.67		16.66	-16.66		16.67	-16.67	\$0.00	\$66.67	\$ -66.67
507.10 Dinner Guest		125.00	-125.00		125.00	-125.00		125.00	-125.00		125.00	-125.00	\$0.00	\$500.00	\$ -500.00
507.20 Holiday Event Guest Tickets		31.25	-31.25		31.25	-31.25		31.25	-31.25		31.25	-31.25	\$0.00	\$125.00	\$ -125.00
507.50 Year End Event Tickets		166.67	-166.67		166.67	-166.67		166.66	-166.66		166.67	-166.67	\$0.00	\$666.67	\$ -666.67
507.60 Special Event Tickets		166.67	-166.67		166.67	-166.67		166.66	-166.66		166.67	-166.67	\$0.00	\$666.67	\$ -666.67
<b>Total Income</b>	<b>\$6,050.00</b>	<b>\$8,881.26</b>	<b>\$ -2,831.26</b>	<b>\$2,600.00</b>	<b>\$8,881.26</b>	<b>\$ -6,281.26</b>	<b>\$11,700.00</b>	<b>\$8,881.23</b>	<b>\$2,818.77</b>	<b>\$19,500.00</b>	<b>\$8,881.26</b>	<b>\$10,618.74</b>	<b>\$39,850.00</b>	<b>\$35,525.01</b>	<b>\$4,324.99</b>
<b>GROSS PROFIT</b>	<b>\$6,050.00</b>	<b>\$8,881.26</b>	<b>\$ -2,831.26</b>	<b>\$2,600.00</b>	<b>\$8,881.26</b>	<b>\$ -6,281.26</b>	<b>\$11,700.00</b>	<b>\$8,881.23</b>	<b>\$2,818.77</b>	<b>\$19,500.00</b>	<b>\$8,881.26</b>	<b>\$10,618.74</b>	<b>\$39,850.00</b>	<b>\$35,525.01</b>	<b>\$4,324.99</b>
<b>Expenses</b>															
601.00 Dinner Meetings		2,916.67	-2,916.67		2,916.67	-2,916.67		2,916.66	-2,916.66		2,916.67	-2,916.67	\$0.00	\$11,666.67	\$ -11,666.67
605.00 New Member Event		625.00	-625.00		625.00	-625.00		625.00	-625.00	1,947.40	625.00	1,322.40	\$1,947.40	\$2,500.00	\$ -552.60
610.00 Holiday Event		458.33	-458.33		458.33	-458.33		458.34	-458.34	3,250.00	458.33	2,791.67	\$3,250.00	\$1,833.33	\$1,416.67
710.00 Special Events		333.33	-333.33		333.33	-333.33		333.34	-333.34		333.33	-333.33	\$0.00	\$1,333.33	\$ -1,333.33
711.00 Year End Event		916.67	-916.67		916.67	-916.67		916.66	-916.66		916.67	-916.67	\$0.00	\$3,666.67	\$ -3,666.67
712.00 Scholarships/Community Outreach		125.00	-125.00		125.00	-125.00	0.00	125.00	-125.00		125.00	-125.00	\$0.00	\$500.00	\$ -500.00
713.00 Professional Event Sponsorship		41.67	-41.67		41.67	-41.67		41.66	-41.66		41.67	-41.67	\$0.00	\$166.67	\$ -166.67
717.00 Photographer		337.50	-337.50		337.50	-337.50		337.50	-337.50		337.50	-337.50	\$0.00	\$1,350.00	\$ -1,350.00
718.00 Bank & Card Fees	119.54	291.67	-172.13	267.07	291.67	-24.60	209.87	291.66	-81.79	514.40	291.67	222.73	\$1,110.88	\$1,166.67	\$ -55.79
719.00 NAEPC Conference		191.67	-191.67		191.67	-191.67		191.66	-191.66		191.67	-191.67	\$0.00	\$766.67	\$ -766.67
720.00 Member Directory		208.33	-208.33		208.33	-208.33		208.34	-208.34		208.33	-208.33	\$0.00	\$833.33	\$ -833.33
731.00 Education		62.50	-62.50		62.50	-62.50		62.50	-62.50		62.50	-62.50	\$0.00	\$250.00	\$ -250.00
733.00 Membership Fees		166.67	-166.67		166.67	-166.67		166.66	-166.66		166.67	-166.67	\$0.00	\$666.67	\$ -666.67
741.00 Insurance		308.33	-308.33	1,092.00	308.33	783.67		308.34	-308.34		308.33	-308.33	\$1,092.00	\$1,233.33	\$ -141.33
744.00 Internet & Technology Fees	0.00	125.00	-125.00	64.13	125.00	-60.87	56.00	125.00	-69.00	400.00	125.00	275.00	\$520.13	\$500.00	\$20.13
752.00 Board Meetings		22.92	-22.92		22.92	-22.92		22.91	-22.91		22.92	-22.92	\$0.00	\$91.67	\$ -91.67
754.00 Postage & Supplies		58.33	-58.33		58.33	-58.33		58.34	-58.34		58.33	-58.33	\$0.00	\$233.33	\$ -233.33
756.00 Executive Secretary		700.00	-700.00	700.00	700.00	0.00	1,400.00	700.00	700.00		700.00	-700.00	\$2,100.00	\$2,800.00	\$ -700.00
761.00 Speaker Fees and Expenses		333.33	-333.33		333.33	-333.33		333.34	-333.34		333.33	-333.33	\$0.00	\$1,333.33	\$ -1,333.33
770.00 Florida Annual Report Fee		5.08	-5.08		5.08	-5.08		5.09	-5.09		5.08	-5.08	\$0.00	\$20.33	\$ -20.33
775.00 Florida Annual Registration		6.25	-6.25		6.25	-6.25		6.25	-6.25		6.25	-6.25	\$0.00	\$25.00	\$ -25.00
<b>Total Expenses</b>	<b>\$119.54</b>	<b>\$8,234.25</b>	<b>\$ -8,114.71</b>	<b>\$2,123.20</b>	<b>\$8,234.25</b>	<b>\$ -6,111.05</b>	<b>\$1,665.87</b>	<b>\$8,234.25</b>	<b>\$ -6,568.38</b>	<b>\$6,111.80</b>	<b>\$8,234.25</b>	<b>\$ -2,122.45</b>	<b>\$10,020.41</b>	<b>\$32,937.00</b>	<b>\$ -22,916.59</b>
<b>NET OPERATING INCOME</b>	<b>\$5,930.46</b>	<b>\$647.01</b>	<b>\$5,283.45</b>	<b>\$476.80</b>	<b>\$647.01</b>	<b>\$ -170.21</b>	<b>\$10,034.13</b>	<b>\$646.98</b>	<b>\$9,387.15</b>	<b>\$13,388.20</b>	<b>\$647.01</b>	<b>\$12,741.19</b>	<b>\$29,829.59</b>	<b>\$2,588.01</b>	<b>\$27,241.58</b>
<b>Other Income</b>															
511.00 Bank Interest	0.46	0.58	-0.12	0.63	0.58	0.05	0.64	0.59	0.05	0.78	0.58	0.20	\$2.51	\$2.33	\$0.18
<b>Total Other Income</b>	<b>\$0.46</b>	<b>\$0.58</b>	<b>\$ -0.12</b>	<b>\$0.63</b>	<b>\$0.58</b>	<b>\$0.05</b>	<b>\$0.64</b>	<b>\$0.59</b>	<b>\$0.05</b>	<b>\$0.78</b>	<b>\$0.58</b>	<b>\$0.20</b>	<b>\$2.51</b>	<b>\$2.33</b>	<b>\$0.18</b>
<b>NET OTHER INCOME</b>	<b>\$0.46</b>	<b>\$0.58</b>	<b>\$ -0.12</b>	<b>\$0.63</b>	<b>\$0.58</b>	<b>\$0.05</b>	<b>\$0.64</b>	<b>\$0.59</b>	<b>\$0.05</b>	<b>\$0.78</b>	<b>\$0.58</b>	<b>\$0.20</b>	<b>\$2.51</b>	<b>\$2.33</b>	<b>\$0.18</b>
<b>NET INCOME</b>	<b>\$5,930.92</b>	<b>\$647.59</b>	<b>\$5,283.33</b>	<b>\$477.43</b>	<b>\$647.59</b>	<b>\$ -170.16</b>	<b>\$10,034.77</b>	<b>\$647.57</b>	<b>\$9,387.20</b>	<b>\$13,388.98</b>	<b>\$647.59</b>	<b>\$12,741.39</b>	<b>\$29,832.10</b>	<b>\$2,590.34</b>	<b>\$27,241.76</b>

# Greater Boca Raton Estate Planning Council, Inc.

## Profit and Loss Comparison

July - October, 2021

	TOTAL		
	JUL - OCT, 2021	JUL - OCT, 2020 (PY)	CHANGE
<b>Income</b>			
501.00 Dues	35,850.00	17,250.00	18,600.00
502.00 Sponsorships			
502.30 Gold Sponsor	3,000.00	1,500.00	1,500.00
502.40 Silver Sponsor	500.00	1,000.00	-500.00
502.50 Bronze Sponsor	500.00		500.00
<b>Total 502.00 Sponsorships</b>	<b>4,000.00</b>	<b>2,500.00</b>	<b>1,500.00</b>
<b>Total Income</b>	<b>\$39,850.00</b>	<b>\$19,750.00</b>	<b>\$20,100.00</b>
<b>GROSS PROFIT</b>	<b>\$39,850.00</b>	<b>\$19,750.00</b>	<b>\$20,100.00</b>
<b>Expenses</b>			
605.00 New Member Event	1,947.40		1,947.40
610.00 Holiday Event	3,250.00		3,250.00
712.00 Scholarships/Community Outreach	0.00	6,500.00	-6,500.00
716.00 Public Relations		300.00	-300.00
718.00 Bank & Card Fees	1,110.88	739.48	371.40
741.00 Insurance	1,092.00	998.00	94.00
744.00 Internet & Technology Fees	520.13	310.67	209.46
754.00 Postage & Supplies		55.64	-55.64
756.00 Executive Secretary	2,100.00	2,800.00	-700.00
781.00 Florida Annual Solicitation Fee		125.00	-125.00
<b>Total Expenses</b>	<b>\$10,020.41</b>	<b>\$11,828.79</b>	<b>\$ -1,808.38</b>
<b>NET OPERATING INCOME</b>	<b>\$29,829.59</b>	<b>\$7,921.21</b>	<b>\$21,908.38</b>
<b>Other Income</b>			
511.00 Bank Interest	2.51	3.23	-0.72
<b>Total Other Income</b>	<b>\$2.51</b>	<b>\$3.23</b>	<b>\$ -0.72</b>
<b>NET OTHER INCOME</b>	<b>\$2.51</b>	<b>\$3.23</b>	<b>\$ -0.72</b>
<b>NET INCOME</b>	<b>\$29,832.10</b>	<b>\$7,924.44</b>	<b>\$21,907.66</b>



# Greater Boca Raton Estate Planning Council, Inc.

## Profit and Loss Comparison

October 2021

	TOTAL		
	OCT 2021	OCT 2020 (PY)	CHANGE
Income			
501.00 Dues	19,500.00	5,100.00	14,400.00
<b>Total Income</b>	<b>\$19,500.00</b>	<b>\$5,100.00</b>	<b>\$14,400.00</b>
GROSS PROFIT	<b>\$19,500.00</b>	<b>\$5,100.00</b>	<b>\$14,400.00</b>
Expenses			
605.00 New Member Event	1,947.40		1,947.40
610.00 Holiday Event	3,250.00		3,250.00
712.00 Scholarships/Community Outreach		5,000.00	-5,000.00
718.00 Bank & Card Fees	514.40	338.85	175.55
744.00 Internet & Technology Fees	400.00	0.00	400.00
754.00 Postage & Supplies		55.64	-55.64
756.00 Executive Secretary		700.00	-700.00
781.00 Florida Annual Solicitation Fee		125.00	-125.00
<b>Total Expenses</b>	<b>\$6,111.80</b>	<b>\$6,219.49</b>	<b>\$ -107.69</b>
NET OPERATING INCOME	<b>\$13,388.20</b>	<b>\$ -1,119.49</b>	<b>\$14,507.69</b>
Other Income			
511.00 Bank Interest	0.78	0.86	-0.08
<b>Total Other Income</b>	<b>\$0.78</b>	<b>\$0.86</b>	<b>\$ -0.08</b>
NET OTHER INCOME	<b>\$0.78</b>	<b>\$0.86</b>	<b>\$ -0.08</b>
<b>NET INCOME</b>	<b>\$13,388.98</b>	<b>\$ -1,118.63</b>	<b>\$14,507.61</b>

First Name	Last Name	E-Mail	Telephone	Renewal Status	Board Member Contacting	Contacted (Y/N)	Notes
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\$300 ✓

GREATER BOCA RATON ESTATE PLANNING COUNCIL  
NEW MEMBERSHIP FORM

1.	Applicant's Name <u>Christopher B Warren</u>	
	Name of Firm or Institution <u>Lawless Edwards + Warren, LLC</u>	
	Address <u>1877 S. Federal Hwy 210 Boca Raton FL 33431</u>	
	Business Telephone <u>561-361-8140 x 231</u>	Business Fax <u>561-361-9370</u>
	E-Mail <u>CBW@LawlessEdwardsWarren.com</u>	Web Site <u>WWW.lawlessedwardswarren.com</u>
2.	I am:	
	A. <input type="radio"/> An officer of a corporation authorized to exercise trust powers in the State of Florida.	
	B. <input type="radio"/> A member of the Bar of the State of Florida. Florida Bar No. _____	
	C. <input type="radio"/> A Certified Public Accountant licensed to practice in the State of Florida, an enrolled IRS agent, or a full-time employee of the IRS (please circle which apply). License No. _____	
	D. <input checked="" type="radio"/> A Certified Financial Planner, Chartered Life Underwriter, Chartered Financial Consultant, Chartered Financial Analyst, Chartered Market Technician, Certified Trust and Financial Advisor, Certified Investment Management Analyst, Chartered Alternative Investment Analyst or Retirement Income Certified Professional (please circle which apply). Certificate No. <u>1091922</u>	
	E. <input type="radio"/> A Certified Fund Raising Executive or full-time planned giving professional employed by or consulting with Section 501(c)(3) organization(s). Certificate No. _____	
	F. <input type="radio"/> An individual who previously held membership in the Greater Boca Raton Estate Planning Council and is retired or not presently working. Dates of prior membership _____	
3.	I have been actively engaged in estate or financial planning (as indicated above) for the preceding <u>32</u> years (at least three years are required) and practicing such profession in Florida for <u>32</u> years (at least one year is required).	
4.	To the best of my knowledge and belief the information contained herein is true and correct. I agree to abide by the decision of the Board of Directors as to the disposition of this application.	
	Date <u>8/31/2021</u>	Signature <u>Christopher B Warren</u>
5.	Recommendations of two current members are required. One of the members must be of the same membership category as the applicant and at least one of the members must be from a firm or institution other than that of the applicant.	
	Signature and Printed Name of First Sponsor: <u>[Signature]</u> <b>BRAD H. MILHAUSER</b>	
	Signature and Printed Name of Second Sponsor: <u>[Signature]</u> <b>Philip Piedt, CFP(R), RICP(R)</b>	

Make your check for \$300 payable to: GREATER BOCA RATON ESTATE PLANNING COUNCIL and mail with application to:  
 GBREPC  
 c/o Sylvia Tausk  
 8597 Dreamside Lane  
 Boca Raton, FL 33496  
 Applications received without payment will not be processed.