Santa Barbara Estate Planning Council Meeting October 27, 2020.

Agenda:

1. Welcome great to see everyone! Stay Safe

Idea of taking computer to the elderly to skype, facetime, etc.

1. Board Announcements:

a). Thank you to Gordon Roberts who’s resigned from the Board. And thank you to Dannell Stuart for her board role and Jonathan Wang for being Treasurer of the Council as they’ve indicated their desire to resign as of December 31st this year

b). Thanks you to Reed Spangler for doing the Council’s annual tax return.

c). Encourage those who would like to be on the Board to let us know. A slate of Officers for 2021 will be going out shortly for your review and vote on the November 24th Meeting. The Board decided to ask all of the current Officers to stay in place for 2021 with the exception of Treasurer, and Dennis Clark has graciously agreed to handle that office. Thanks to the Current Board for their service and tenacity.

d).Good news is that annual dues are not going up for 2021, they are staying at $400. Per year. Additional good news is that current members will get a $150 credit toward their 2021 dues, meaning they will only owe $250. Bills go out in December.

e) Please let Austyn Shephard know if there’s a change in your membership status so we can stay current. Also remember to invite guests and encourage new members. We’re also open to program ideas though we will be having more webinars in 2021 which will bring us some national topics and presenters.

f) Remember to register for the events to get continuing education credits

3) Guests and Announcements from Members

1. Turn over to Vice President Jeff Avila for the introduction of our speakers