

The Ottawa Estate Planning Council

To: Members of the Ottawa Estate Planning Council
From: Sebastien Desmarais LL.B, J.D.(USA), LL.L. TEP - President
Subject: 2018 – 2019 Program
Date: August 20, 2019

Please accept this invitation to renew your membership in the Ottawa Estate Planning Council (OEPC) for the 2019-2020 season. Your Board of Directors has been working together this summer to assemble an informative and enjoyable program for the upcoming season. We have also been working on ways to heighten your experience as a Member of the Ottawa Estate Planning Council with increased visibility and networking opportunities.

The following information should encourage you to renew your membership and will be of interest to those of your colleagues who have allowed their membership to lapse or who have not yet experienced the pleasures of a membership in the OEPC.

PROGRAM

Topics this season will include a wide range of interests of our members, from every profession. The program provides opportunities to obtain current information from experts in the field and chances to be inspired by compelling speakers. The full schedule will be posted on the website (www.oepc.ca) once all presenters and topics have been confirmed; the dates of the meetings have been set as follows:

- Tuesday, October 8, 2019
- Tuesday, November 5, 2019
- Tuesday, December 3, 2019
- **Wednesday**, January 8, 2020
- Tuesday, February 4, 2020
- Tuesday, March 3, 2020
- Tuesday, April 7, 2020

WEBSITE

Please visit our website at www.OEPC.ca. There you will find all of the information about the Ottawa Estate Planning Council and how it works. You can view the meetings, add your profile as a council member, confirm your attendance to meetings and much more.

The new password is: oepc2019

COST

Membership Fee for the 2019-2020 is \$450.00, please submit your payment by cheque payable to Ottawa Estate Planning Council attach it to the Registration Form (attached) and mail it to:

Ottawa Estate Planning Council
101 – 141 Catherine St.
Ottawa, ON K2P 1C3

Your Membership Fee covers all 7 meetings of the season and includes pre-dinner cocktails, a networking opportunity, dinner and a post dinner presentation offering educational insight. There is a \$25.00 discount per additional member for firms with multiple memberships.

MEMBERSHIP

As this is a membership driven organization and we've been extended the privilege of using the facilities of the Rideau Club, invitation to our meetings will only be extended to our members and their guests. Memberships can be shared and we will continue to allow for Membership Transfers (with some new limitations) if you are unable to attend. We cannot, however, allow people to pay for only selected meetings, unless of course they are attending as paid guest of a Member.

MEMBERSHIP TRANSFER

Should you be unable to attend a meeting, a colleague may take your place at no additional charge. **We are implementing a 2 times per season limit to the number of times you can transfer your membership to a guest. We are also limiting guests to 2 times per season that they can attend in any member's place.** Please be sure to indicate on your confirmation if someone is attending in your place.

GUESTS

Your guests are always welcome. **We have increased the Guest Fee to \$100.00 per visit.** Please note that payment for guests **must be made in advance or "at the door"**. Cheques should be made payable to the "Ottawa Estate Planning Council".

MEETING PROTOCOL

As our meetings include a sit-down dinner, it is imperative that you confirm your attendance (and any guests), by replying to the Notice of Meeting email or via the OEPC website (www.oepc.ca). We will also have greeters situated outside the door to confirm registration for all those in attendance and to accept membership payments and Guest Fees – all payable by cheque.

MEETINGS

The first meeting of the season is scheduled for Tuesday, October 8, 2019; the Notice of Meeting for this event will be sent out in mid to late September. **Please confirm your attendance after the Notice of Meeting is sent out.** Except for October and January, all meetings will be held the first Tuesday of each month. The October meeting is being held on

the second Tuesday of the month, and the January meeting will be held on Wednesday January 8th.

TIME

Each meeting begins with cocktails and a networking opportunity beginning at 5:30, followed by dinner at 6:25 and the presentation at approximately 7:30, with the meeting coming to a close at about 8:30.

LOCATION

The Rideau Club, 99 Bank Street, 15th Floor.

Dress Code:

For men: jackets, collared shirts, ties, tailored slacks, or suits.

For women: dresses, suits, skirts with blouses, tailored trousers with blouses, or evening pants.

ACCREDITATION

We do provide CE Certificates for our meetings; however due to cost constraints we do not obtain pre-approval from Advocis. In the past, some members have had issues when submitting our CE Certificates – so please take caution and ensure that you are not depending on these credits to reach your requirements for licensing. Please ensure that you advise us of your intention to attend the meeting in advance so that a certificate will be there for you and your guest(s) if necessary.

NEW MEMBERS

We welcome new members. Please share this information with your professional colleagues, especially those who may be new to town and provide their email address to Shannon MacDonald at smacdonald@jrsaint.com to be added to the Distribution List.

HOW TO JOIN/RENEW

Please complete the Membership Registration and submit it with your cheque and a business card. Should you have any questions, please call Sebastien Desmarais at 613-714-0740, Jim Saint at 613-232-4577 x101, or Jim's Assistant Shannon MacDonald at 613-232-4577 x102. Please be sure to indicate your email address on your registration when you pay your Annual Membership Fee or provide it to Shannon at smacdonald@jrsaint.com.

INVOICE

Annual Membership Fee: **\$450.00**

Guest Fee: **\$100.00**

Please make cheque payment to: The Ottawa Estate Planning Council

and remit to: James Saint, Secretary
c/o J.R. Saint & Associates
101 – 141 Catherine Street
Ottawa, ON K2P 1C3

PLEASE TEAR OFF

Include membership registration below with cheque for dues and attach business card

MEMBERSHIP REGISTRATION

Name: _____

CE Credits required: YES _____ NO _____

Business: _____

Address: _____

Telephone: _____

Fax: _____

Email: _____