



ESTATE PLANNING COUNCIL

www.berkscountyepc.org

Our Council consists of members from various disciplines including accountants, attorneys, insurance and financial advisors, trust officers, and other related professionals. Members meet four times per year for networking and an educational seminar on current estate planning topics. All meetings are held at the Berkshire Country Club (except the Holiday gathering).

2022-2023 LEADERSHIP

- President** **Robert R. Kreitz, Esq.**
Kreitz Gallen Schutt
- Vice President** **Tricia Salvatore Ludgate, CFP®**
Sovereign Financial Group, Inc.
- Secretary** **Michael Dinan, CFP®**
Domani Wealth
- Treasurer** **Kim L. Ressler, CFP®, CTFA**
Girard, a Univest Wealth Division
- Immediate Past President** **Sarah L. Rubright McCahon, Esq.**
Barley Snyder
- Board Members** **Jennifer L. Nevins, Esq.**
Stevens & Lee, PC
- Marty Darocha, CPA**
Martin A. Darocha, CPA


CONTACT INFORMATION
Vivi Anthony, EPC Administrator
 Berks County Community Foundation
 237 Court Street, Reading, PA 19601
 Phone: 610.685.2225 | vivia@bccf.org




2022 – 2023 | Calendar of Events

First-time guests are free; a \$75 guest fee after the first visit.

Wednesday, October 19, 2022

Location: Berkshire Country Club, 1637 Bernville Road
 Time: 5:30 pm | cocktails and networking
 6:30 pm | dinner and speaker
 Sponsor: 
 Speaker: **Marc Balcer, CFA, SVP Director, Investment Strategy, Univest Bank**
 Topic: Where Do We Go from Here? What Today's Economy Can Tell Us About What's to Come

Wednesday, December 14, 2022, | HOLIDAY Gathering and Fundraising Event (\$50 guest fee)

Location: Reading Public Museum, 500 Museum Road
 Time: 5:00 – 8:00 pm | cocktails and hors d'oeuvres
 Sponsor: 
 Topic:

Wednesday, January 18, 2023

Location: Berkshire Country Club, 1637 Bernville Road
 Time: 11:30 am | networking
 12:00 pm | lunch and speaker
 Sponsor: 
 Speaker: **To be announced**
 Topic: *To be announced*

Wednesday, March 22, 2023

Location: Berkshire Country Club, 1637 Bernville Road
 Time: 5:30 pm | cocktails and networking
 6:30 pm | dinner and speaker
 Sponsor: 
 Speaker: **To be announced**
 Topic: *To be announced*

Wednesday, May 24, 2023

Location: Berkshire Country Club, 1637 Bernville Road
 Time: 5:30 pm | cocktails and networking
 6:30 pm | dinner and speaker
 Speaker: **To be announced**
 Topic: *To be announced*