



NEWS TODAY July 8, 2022

Hilton Head Area Council of Estate and Financial Advisors

President – Laura Clark



Congratulations to our new Board members!

President

- Laura Clark of Coastal States Bank

VP Programs

- Janice Robinson of South State Wealth Management

VP Membership

- Christopher L. Tassone of Principal Financial Group

VP Communications

- Jill R. Kroamer of Olivetti, McCray & Withrow, LLC

Treasurer

- Michael Putich of Robinson Grant & Co., PA

Secretary

- Gigi Maxfield of Womens Financial Network, LPL

Directors

- Aaron Nelson, Jr. of The Nelson Law Firm of Bluffton, LLC
- Christopher M. Tassone of Principal Financial Group
- Scott Baker of Morgan Stanley
- Lindsay Sutcliffe of Burr & Forman LLP



PRESIDENT (and outgoing Treasurer) – Laura Clark



Our meeting in May brought the conclusion of another productive season for CEFA- a well-attended meeting, great panel discussion and member participation. Chris Tassone and Gigi Maxfield made the presentation to our 2022 Scholarship recipient. Thank you to each member who helped make the \$1000 scholarship possible.

In addition, we could not have had the quality programs and venues at The Oak Terrace, Rose Hill were it not for the generous support of our sponsors: Olivetti McCray & Withrow, South Sate Bank, South State Wealth and Coastal States Bank. I challenge each member to work to find new sponsors for our upcoming season. This is invaluable in helping us to be able to present exceptional programming for our members.

The Oak Terrace and their staff treated CEFA with professionalism and were welcoming to each member.

As I transition out of the role as Treasurer and into my new role as President, I cannot help but reflect on the changes to CEFA that I have seen in the past several years. The leadership team has done an amazing job of bringing quality to our organization:

- Our membership enrollment is flourishing and we are 42 members strong, with 7 emeritus and 3 prospects to return this fall; all have expressed a desire to join CEFA.
- Our events have provided program content that is timely and relevant to each of our professions

Our new board will meet August 4th and the agenda will be a discussion of the upcoming (5) programs for the new term, our annual budget needs, membership development, sponsorship opportunities and what our Vision will be for the coming season and beyond.

I am excited to work with our board and our members to bring that vision to fruition- to help enrich the experience for each member and to provide a space to meet, learn and grow as professionals.

I hope this gives you a little behind the scenes insight as to what it takes to

make your council be the best it can be. Will we be a **5 Star Council** again this year? My guess is yes, but we will have to wait until November to know.

One ask: please check with your company or at least one other company that you think may be interested in being a sponsor. It makes a huge difference. It allows us to provide a sponsorship for a young person; provide interesting programs in wonderful locations and provide an environment where our professionals can mingle, get to know one another and help one another and their clients.

Please thank our sponsors when you see or communicate with them: Olivetti, McCray and Withrow, LLC, South State Private Wealth, South State Bank, Coastal States Bank and I think we have a few more coming. Thank you all so much. You make a great difference!

OUTGOING PRESIDENT – Janice Robinson



2021-22 in the Rearview Mirror

It has been my pleasure to serve you as your president these past two years. I am excited to support Laura in her new role as President. I want to thank Michael for moving from his role to treasurer as well as the other board members that plan to continue in new or existing roles. Welcome new board members! I look forward to the great participation and the ideas you will all bring to the table. I also want to thank each and every one of you for your participation as well as your questions and suggestions. They are extremely important to the board and appreciated.

I will be moving back to the role of programs and events; I ask for your support in bringing your suggestions to me for topics you wish to either deliver or would like for us to find a speaker to deliver. I will also strive to find more opportunities to provide CE and CLE credits.

In 2022-23, I want to have a program for the community and would appreciate your feedback on what that topic should be. My hope is that it is something that will be of interest to you as well as introduce each of you to the community. I see it as “estate planning and financial advising fair”. We would

have door prizes, food/drinks, etc. in addition to the program and questions and answers. What are you seeing your clients want to know more about?

We received our second 5 Star designation as part of the national estate planning program. This insignia can be placed on your letterhead, emails, of course, where your companies allow. If you wish to have a copy of that, we can provide to you.

Again this year, we offered our second scholarship for \$1000. We hope to find a sponsor for this scholarship – who do you know inside or outside the council that may be interested in knowing more? We have two forms and will be happy to provide those again to you. The scholarship sponsorship can be in honor of someone or after their firm, etc.

One of the accomplishments I am most proud of is how we have grown these last two years. And it is all thanks to you all. Keep looking for prospects and invite them to our fall meeting. As a reminder, prospects are at no costs for attending meetings, but guests are asked to consider a donation of \$25 to our scholarship fund.

Here's to a great 2022-23 year!

MEMBERSHIP – Christopher L. Tassone



Great news!

We had 7 new members join this year and already have several prospects!

Remember, CEFA members are encouraged to nominate other professional practitioners for membership. Interested professionals are invited to apply for membership but must be invited by a member.

There are two types of membership: 1) Full Membership 2) Associate (non-voting) – in a related field. A member sponsoring a prospective member initiates the nomination process by inviting a prospect to attend at least two membership meetings during which the sponsor will introduce the prospect to

other members, especially the Vice President for Membership and other Board members. The sponsor will then proceed to formally nominate the prospect by writing a letter to the Vice President for Membership with an enclosed resume of the prospect. The nomination letter should include the category of membership of the prospect, the duration of practice in the area, the location of principal offices, and when the prospect attended CEFA meetings as a guest. The sponsor would ensure that the prospect has read the Letter of Commitment (see the “Documents” section) and is prepared to pay annual dues for membership. The Vice President for Membership will then present the nomination to the Membership Committee which, in turn, would make its recommendation to the Board. The VP/Membership reports the recommendation during a regularly scheduled Board meeting. Normally, the Board votes on the nomination during the following Board meeting. The nomination process takes up to six months (two meetings and Board meetings) unless the Board accelerates the process at its discretion.

We awarded our second CEFA Scholarship this year and hope to continue this tradition. It is one of the best things we do for the local community. Please let me know if you are interested in serving on the Scholarship Committee or are interested in becoming a sponsor.

Check it out! Our website has been recently updated to reflect our current members and our sponsors. You can log into your profile and make updates. Only headshot changes will need to be emailed to our CEFA Administrator, Susan Hartmann at slhartmann.sc@outlook.com. Please make sure you have a headshot and your information is correct. This is a great value proposition—don't miss out!

Last but not least, we are committed to improving public literacy about legal and financial matters. Please contact me if you wish to be added to our list of speakers on our Speakers Bureau page.

OUTGOING TREASURER – Laura Clark



It has been a great experience working with several boards now as treasurer since 2019- I am looking forward to working with the new slate of board members and for another amazing season with CEFA.

We ended the season on a positive note, having funds in the account to pay all expenses associated with the 2021-2022 events and other operating expenses for the organization. This is in large part to the sponsorships we received from Olivetti, McCray & Withrow, South State Bank, South State Wealth and Coastal States Bank.

The membership dues are starting to flow in- Thank You!

There are still some members who need to send in their payments for 2022-2023 season. Michael Putich, as the new treasurer, will be monitoring those payments.

If you would like to pay by Credit Card- please contact me directly- we use Square and would need to pass the 4% processing fee onto each card that we take for payment, or a fee of \$12.00 on top of the \$300 for the dues. My Office Number is (843)689-7812

If your company is paying and they only pay via ACH payments, please let me know and I can complete the ACH autopay form for your organization with CEFA's banking details.

NAEPC Award of Excellence for 2022-2023 5 star Award- we have submitted the application for this award, to be awarded next spring. Thank you to Janice Robinson and Chris Tassone for getting this application done the last 2 years- they made the application process for me much easier to complete. We look forward to being awarded our 5 Star Excellence once again!

Please thank our sponsors.



OLIVETTI McCRAY & WITHROW LLC
ATTORNEYS AT LAW

