

**MINUTES FOR**  
**ESTATE PLANNING COUNCIL OF NORTHEAST WISCONSIN, INC.**  
**ANNUAL MEETING - JANUARY 29, 2021**

The 58<sup>th</sup> Annual Meeting was called to order by President Evan Lin and held by Zoom due to the COVID 19 pandemic. Board members were introduced by Evan. In addition, Evan introduced Russ Wood as a new board member.

Minutes from the January 22, 2020 annual meeting were electronically sent to members. A motion to approve the minutes was made, seconded and passed.

The attached Treasurer's Report for the year ending December 31, 2020 was electronically sent to members. Ryan Laughlin gave a summary of the report. A motion to approve the Treasurer's Report was made, seconded and passed.

Evan mentioned that the Ryan Laughlin is on the National Board and can nominate members for the AEP designation, as long as they have 10 years in practice.

Evan mentioned the upcoming events for 2021. They include a virtual spring seminar, the golf outing in the summer and an in-person Fall Seminar with Jonathan Blattmachr. In addition, he mentioned Ryan Laughlin was recently named editor of the National Estate Planning Council Journal. Ryan mentioned that you could contact him if you want an article published in the Journal or if you want to be involved in a virtual collaborative writing workshop to write an article for the Journal.

Evan introduced our guest speaker, Dr. Marc Schaffer, from St. Norbert College. Dr. Schaffer was joined by Mr. Peyton Jack, a senior at St. Norbert College. Dr. Schaffer and Mr. Jack provided a presentation on the current economy.

There being no further business, the meeting was adjourned.

Respectfully submitted,

Estate Planning Council of  
Northeast Wisconsin, Inc.

By: \_\_\_\_\_  
Jeffrey J. Martinson, Secretary