

GREENE COUNTY ESTATE PLANNING COUNCIL

MARCH 16TH, 2022

SPEAKER: David Compere

**Topic: USING FINANCIAL
PLANNING SOFTWARE TO
ILLUSTRATE RETIREMENT &
ESTATE PLANNING CONCEPTS
FOR CLIENTS AND ADVISORS
WHO HELP THEM**

Our very own GCEPC vice president, David Compere, will be showing how the use of financial planning software aids clients and advisors when doing retirement planning, estate planning, and other goal planning for clients.

David has more than 22 years experience working in trust companies, Registered Investment Advisors (RIA's), and brokerage firms. He is currently a financial advisor with UMB Private Wealth Management. David oversees the wealth management department for UMB in the Greater Missouri market which includes all areas of Missouri except for Kansas City and St. Louis. David is a CFP®, and a CTFA. He holds a series 7 investment license as well as an insurance license.

WELCOME BACK

2021-2022

Membership Information

All dues have been invoiced. If you have not received yours contact us at coordinator.gcepc@gmail.com

Reminder – please get your renewals in as soon as possible

2021-2022 MEETING DATES

**ALL MEETINGS WILL BE
HELD AT TWIN OAKS
COUNTRY CLUB**

~~September 15, 2021~~

~~October 20, 2021~~

~~November 17, 2021~~

~~December 15, 2021~~

~~January 19, 2021~~

~~February 16, 2021~~

March 16, 2021

April 20, 2021

December Menu Options

1. Beef –
Beef Tuscan with cremini mushrooms, roasted mashed potato, and chef choice vegetables
2. Chicken –
Chicken Oscar served with lemon chive, chive risotto, and grilled asparagus
3. Fish
Grilled market fish with lemon, chive risotto, and grilled asparagus

Dessert – New York Cheesecake

RESERVATIONS ARE REQUIRED

Please RSVP no later than 5:00 pm on December 13, 2021

5:30 Gathering – First Call

6:00 Dinner

6:30 Program

7:15 appx Business Update

Please let me know at coordinator.gcepc@gmail.com if there are any dietary restrictions so we can prepare accordingly

2021-2022 OFFICERS / DIRECTORS

PRESIDENT

Steve Aton

Aton Law Firm
417-881-5667
steve@atonlaw.com

PRESIDENT - ELECT

David Compere

UMB Financial Services
417.891.2101
David.Compere@umb.com

TREASURER

Steve Kamienski

Simmons Wealth Management
417.875.5253
Steven.Kamienski@simmonsbank.com

SECRETARY

Donald Hagan

HTSG, CPAs + Advisors
417-887-7912
dhagan@htsgcpa.com

Other Directors

Terms Expire 2022

Meredith Bosso
Martha Atkisson
Matthew Schmidt
Karla McCullough

Terms Expire 2023

Holly Gray
Tammy Young
Brad Risby
Janet Helfrecht

Important Notice:

Several members are not receiving communications.

If you or another member have not received the event information for this dinner.

Please reach out to me directly at coordinator.gcepc@gmail.com