

SAN ANTONIO

Estate Planners COUNCIL

AN ORGANIZATION OF ATTORNEYS, CERTIFIED FINANCIAL PLANNERS,
CERTIFIED PUBLIC ACCOUNTANTS, CHARTERED LIFE UNDERWRITERS,
AND TRUST OFFICERS FORMED TO PROMOTE THE ADVANCEMENT OF
ESTATE PLANNING

2018 – 2019 OFFICERS

PRESIDENT

KEVIN P. SHAY, CPA®

VICE PRESIDENT

JULIE HARDAWAY, TRUST OFFICER

SECRETARY

HEATHER WEBB, ATTORNEY

TREASURER

BEN GURWITZ, CFP®

IMMEDIATE PAST PRESIDENT

DOUG STONE, CFP®

BOARD OF GOVERNORS

Term Expiring 2018:

HARRY WOLFF, III, Attorney

DOUG STONE, CFP®

CAROLYN SMITH, CPA®

MICHAEL SIERRA, Trust Officer

Term Expiring 2019:

PATRICIA VARGAS, Attorney

KIM CORNWELL, CFP®

KEVIN P. SHAY, CPA

JON DAUBERT, Trust Officer

Term Expiring 2020:

AMELIA EDELMAN, Attorney

KRISTIN CARLTON, CFP®

BENNETT ALLISON, CPA®

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Term Expiring 2021:

HEATHER WEBB, Attorney

ROBERTO ESPINOSA, CFP®

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CONRAD NETTING, Trust Officer

Term Expiring 2022:

MAGGIE GILTNER, Attorney

BEN GURWITZ, CFP®

ALICIA GILL, CPA®

CANDACE TOTTENHAM, Trust Officer

BALLOT FOR BOARD OF GOVERNORS SAN ANTONIO ESTATE PLANNERS COUNCIL 2019-2020

As a member of the Board of Governors of the San Antonio Estate Planners Council, please cast your votes for the proposed slate of new governors nominated by our nominating committee for the year 2019-2020. Please cast your vote via email at sanantonioepc@gmail.com.

PROPOSED SLATE OF NEW BOARD OF GOVERNORS FOR 2019-2020

CFP

Stephanie Harris, CFP®
S Harris Financial Group
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ATTORNEY

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TRUST OFFICER

Tammy M. Ashby, Trust Officer
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CPA/TREASURER

Jim Oliver, CPA®
Caveletti Ferguson
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For ()

Against ()

Name: (optional) _____

SAEPC COUNCIL ADMINISTRATOR
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