



Enhancing The Proficiency of Advisors in Charlotte County

Our membership is open to all professionals serving those with estate planning needs, including but not limited to accountants, attorneys, financial planners, bankers, trust officers, guardians, insurance agents, real estate agents, and nonprofit organization leaders.

Who We Are

The Charlotte Estate Planning Council focuses on estate planning education and keeping our members abreast of current developments. Our meetings feature knowledgeable speakers on topics of interest to our members, including changes to estate law, taxation, charitable giving, and financial planning. Members actively participate at meetings and foster the exchange of ideas through open discussion.

Why Choose Us



Business Networking

Ability to network with other Estate Planning Professionals in the Charlotte County and the surrounding areas.



Professional Development

Offer educational opportunities to our members through the National Estate Planning Council and local presentations.



Return on Investment

Through your investment in professional development and networking opportunities, you will attract new clients and business opportunities.

Sponsorship Opportunities

Annual Dues \$75

- Network Luncheon Invite
- Email Updates
- Contact information listed on CEPC Website

Lunch Sponsor \$275

- 5 minutes to promote business at the beginning of luncheon
- Table at checkin to promote business materials
- Logo listed on the luncheon slideshow

Gold Sponsor \$500

- Logo on website sponsor page
- Logo on luncheon slide show and marketing materials
- Recognition at all events

Silver Sponsor \$350

- Logo on website on sponsor page
- Recognition at all events