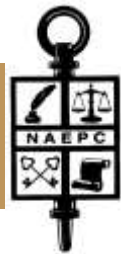


Learning Pod Notes



Crafting Exciting Events with Broad Appeal

Use to be very tech, but have moved away from it.

Many attendees said they poll their members.

Types of Programs / Events:

- Provide program with a workshop to follow.
- Lunch – lunch and learn/ brownbag round table meeting (smaller topic that does not have broad appeal), providing cookies and drinks
- Emerging professionals
- Paraprofessional meeting
- Social
 - o wine expert
 - o prospective member events
 - o holiday events with CPAs
 - o beer event
 - o art museum event (art appraiser, tours and happy hour)
 - o yacht cruise
 - o cooking class
 - o curling class
 - o pottery class
- Dinner events
- Charitable involvement – back to school drive (Christmas toy drive); Goodwill volunteer event has been very well received
- Webinars
- Breakfast meetings
- Joint meetings – Young CPA events, FSP, Community Foundation, other social councils
- Collaborative case studies
- Study groups
- Networking events
- Performing arts events
- Speaker donation to charity / community foundation

Topics:

- Estate planning for digital access.
- Etiquette program.
- Economic review
- End of life planning (panel)
- Divorce planning – multidisciplinary

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- Multi-generational family communication
- Woman initiative meetings
- Philanthropic charitable giving
- Fiduciary incapacitated people
- Artificial intelligence
- "Happiness" topic – book/author

Promotion of Programs:

- Through other professional groups (Bar Association, FPA, CPA)

Sponsorship:

- 75th anniversary of council
- Assign teams at events – break up groups, force communication
- Team building / connections – Escape Room?
- Community Outreach event – Habitat for Humanity
- Man phones for American Cancer Society

CLE EPC:

Need to have broader areas of topic.
Junior Level and Regular Level

DALLAS EPC:

½ of the meetings are AM meetings
½ of the meetings are lunch meetings
Hold meetings in different areas of the city
Topics include Washington update, life insurance

BOSTON EPC:

Create a track system.

TULSA EPC:

Use sponsors.
Easy to move about the city.
Opportunity for charitable organizations to present.
Topics include audits, probate examiner

PITTSBURGH EPC:

Topics include handwriting analysis, etiquette program
Big evening social
Trying to bring life back to meetings – making the topics current
Provide program with a workshop following

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DC EPC:

Technical topics

New member luncheon

New members – interviews with current members

Topics include: practice management, devise family needs

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