

QC Estate Planning Council

Meet the 2019-2020 Board!

- President:** Adam Kunkel, CPA, MST
Tax Director, Principal
Rock River Family Office, LLC
- Vice President:** Erie Johnson
Senior Fiduciary Relationship Specialist
Wells Fargo Wealth Management
- Secretary:** Joshua Robinson, MSFS, AIF, CFS
Co-Founder and Managing Director
PR Wealth Management
- Treasurer (as nominated):** Jennifer Kincaid, JD
Partner
Pepping, Balk, Kincaid & Olson, Ltd.
- Immediate Past President:** Sam Skorepa, JD
Partner
Lane & Waterman, LLP

QC Estate Planning Council

Standing Rules

1. Endorsements and events held jointly with other nonprofit organizations will be considered on a case by case basis and should be in keeping with the mission of the Local Council.
2. Cost of council sponsored AEP designation will be borne by each individual *QCEPC* Member.
3. Board Members will sign an annual Conflict of Interest Statement, as suggested by Iowa Principles and Practices for Charitable Nonprofit Excellence (Mauro, 2006).
4. The incoming Vice President will attend the National NAEPC conference with registration, travel, and hotel expenses paid by the Local Council.
5. A Board Member may allocate up to \$1000 inclusive of expenses to a Program Speaker. Any amount in excess of \$1000 must be approved by the Board.
6. The Treasurer and one other Board Member will serve as Signators on the Local Council checking account *and credit card*.
7. Paid staff is limited to a per diem Executive Administrator whose job description may be reviewed annually.
8. State and Federal returns for tax purposes and other reporting requirements will be filed by the Treasurer, with assistance from the Executive Administrator *&/or outside Counsel*, if needed.
9. Standing Rules will be reviewed & offered for approval annually at each Annual Local Council Meeting.

**Last Approved at May 2018 Annual Meeting*

***To be Re-Approved at May 16, 2019 Annual Meeting*