



# Great Lakes Bay Estate Planning Council

Website: [www.glbecp.org](http://www.glbecp.org)  
2024-2025 Officers



President: Chelsea Brown  
Vice-President: Shane Bradley

Sec/Treasurer: Kyle Fahrner  
Past President: Kevin Scorsone

## SAVE-THE-DATE

**Thursday, January 23, 2025**

**12:30 p.m. to 1:30 p.m.**

The January Meeting and Luncheon of **Great Lake Bay Estate Planning Council** will be held at the **Great Hall Banquet & Convention Center in Midland**. The luncheon will be served at noon. The meeting will also be available **remotely at the Mt. Pleasant location as Isabella Bank**.



The January presenter will be Geoff Moore, the Chief Information Officer of Valmark Financial Group. The presentation, "Artificial Intelligence: Practical Applications for Professional Advisors," and provides an introduction to the many ways artificial intelligence can assist those in the areas of accounting, law, trust and financial advising to provide better advice to more clients. He will also address the need to carefully balance regulatory compliance with the operational freedom of independent advisors, while still protecting sensitive client data. He will explain how firms are strategically employing AI while ensuring strict adherence to data protection standards.

Please mark your calendars and plan to attend this program to hear more about how Artificial Intelligence works and watch for the official Meeting Notice next month!