



# Great Lakes Bay Estate Planning Council



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## MEETING NOTICE

**DATE:** Thursday, September 28, 2023  
**TIME:** 12:00 PM – 1:30 PM  
**SPEAKER(S):** Keith D. Harder, CFP®, and Travis C. Bigler, CPA, MST  
**TOPIC:** TAX UPDATE  
**PLACE:** Great Hall Banquet & Convention Center  
Valley Plaza, 5121 Bay City Road, Midland, MI 48642  
**SATELLITE  
LOCATION:** Isabella Bank, 139 East Broadway, Mt. Pleasant, MI  
**ZOOM OPTION:** This meeting will also be available on Zoom  
*A web conference link will be emailed prior to the meeting.*

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Keith D. Harder, CFP®, is a Principal with Rehmann Financial. Keith has extensive experience in the field of financial planning. Since 1996, he has worked with high- net worth individuals in creatively building financial strategies that strive to help clients work toward their financial goals, including tax efficient investment and inter-generational wealth planning and philanthropy.

Keith's experience with the many facets of qualified and non-qualified retirement plans allows him to use this in-depth knowledge to bring customized answers to his clients. He is a Certified Financial Planner professional and holds numerous securities registrations and insurance licenses.

Keith has a Bachelors Degree in Economics and a Bachelors Degree in Religion from St. Olaf College of Northville, Minnesota.

Travis C. Bigler, CPA, MST, is a Senior Manager at Rehmann Financial. Travis began his public accounting career in 2014 and is experienced in providing both accounting and tax services for a variety of businesses, from commercial entities to not-for-profit organizations. As a graduate assistant for Dale Carnegie, Travis helps professionals master the skills to communicate logically, clearly and concisely. He is currently a member of Rehmann Financial's business valuation team and when working with his clients, Travis is committed to clearly defining expectations, fully explaining the engagement process and answering their questions in a timely manner.



Travis has a Bachelors of Science Degree in Accounting from Ferris State University in Big Rapids, Michigan, and a Master of Science in Taxation from Grand Valley State University in Allendale, Michigan.

This meeting will also be available on the Zoom platform. The link will be emailed to members early that week. If you have not received notice of the link by the day before the meeting, please contact us.



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Your registration is required if you plan to attend this meeting in person at either venue. A buffet lunch will be served at noon. You may register by sending an email to [admin@nmepc.org](mailto:admin@nmepc.org) or by mailing the registration form on the next page to: GLBEPC, P.O. Box 347, Freeland, MI 48623. **Please RSVP by September 22, 2023.**

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**MEMBERS:** \_\_\_\_\_ Please reserve a place for me at the meeting (no charge).

**NAME OF MEMBER:** \_\_\_\_\_

**LOCATION:**  Midland  Mt. Pleasant

**GUESTS:** (PLEASE NOTE: A first-time guest may attend a meeting at no extra charge. Subsequent visits by the same guest are subject to a \$25 fee that includes lunch.)

Please reserve places for \_\_\_\_\_ guest(s) at the meeting.

\_\_\_\_\_ **This is a first-time guest (no charge).**

\_\_\_\_\_ **This is a returning guest (\$25 per guest).**

**TOTAL ENCLOSED \$** \_\_\_\_\_

Please make checks payable to: **GREAT LAKES BAY ESTATE PLANNING COUNCIL (GLBEPC).**

**GUEST(S):**

Name \_\_\_\_\_ Name \_\_\_\_\_

Company \_\_\_\_\_ Company \_\_\_\_\_

Address \_\_\_\_\_ Address \_\_\_\_\_

\_\_\_\_\_

Phone \_\_\_\_\_ Phone \_\_\_\_\_

Email: \_\_\_\_\_ Email: \_\_\_\_\_