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January 2010

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## AWSCPA NEWSLETTER



### *January Speaker Presentation*

Marilee S. Lonergan, MS, Financial Consultant, at AXA Advisors LLC

Presenting

"The Family Love Letter"

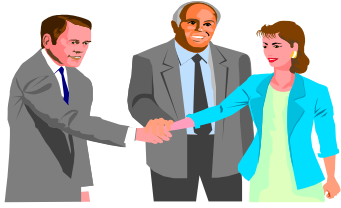
Key to the Execution of Your Estate Plan

The *Family Love Letter Program* gives families a lasting and important gift -- all the vital information your loved ones need to know in case of sudden incapacitation or death. It covers a range of crucial issues beyond your will, including:

- Someone to speak for you in legal, financial, and medical matters
- The guardian for your children
- Your wishes regarding medical treatment "

Speaker Biography:

Marilee S. Lonergan earned a BS from the University of Tulsa and an MS from Oklahoma State University. She started with AXA Advisors LLC in 2006 and is passionate about her work, especially when assisting women and families. She has been married 23 years and has sixteen year old boy/girl twins and a 14 year old son. She is very active in the youth program at her church, First Presbyterian Church. As a direct result of the Family Love Letter program, she works with a funeral coordinator to provide education to members regarding the benefits of planning.



## **AWSCPA OF OKLAHOMA GREEN COUNTRY**

AFFILIATE OF AMERICAN WOMEN SOCIETY OF CPA'S

### JANUARY 2010 LUNCHEON MEETING

“The Family Love Letter”  
(Key to the execution of your estate plan)

Presented by Marilee S. Lonergan, MS

January 28, 2010

11:30- 1:00 PM

TiAmo Italian Ristorante  
6024 S. Sheridan Road

\$18 Members / \$25 Nonmembers

**Please RSVP (with lunch selection) by 5:00 p.m., Tuesday, January 26, 2010.**

Chicken Fettuccine Alfredo  
Or  
Chicken Napoli with Olives and Almonds  
Or  
Caesar salad with Grilled Chicken

(Entrees include bruschetta, soup or salad, dessert and drink)

RECOMMENDED FOR ONE HOUR CPE  
LEVEL OF KNOWLEDGE: BASIC  
PREREQUISITES: NONE

**ALL UNFILLED RESERVATIONS WILL BE BILLED DUE TO THE FACT THAT  
AWSCPA WILL BE BILLED FOR YOUR RESERVATION BY THE RESTAURANT  
(Cancellation deadline 5:00 p.m., Tuesday January 26, 2010)**

To make reservations, please contact Sheri Brenner by email or phone. Her email address is [sheri.brenner@willbros.com](mailto:sheri.brenner@willbros.com) and her phone number is 499-3741. Please reference the AWSCPA luncheon.



## **DATES TO REMEMBER**

February 25, 2010 AWSCPA Luncheon

March 25, 2010 AWSCPA Luncheon

April 27 & 28, 2010 TU Conference of Accountants

President	Sheri Brenner	<a href="mailto:sheri.brenner@willbros.com">sheri.brenner@willbros.com</a>	499-3741
Treasurer	Debbie Clegg	<a href="mailto:debbie.clegg@williams.com">debbie.clegg@williams.com</a>	573-2173
Arrangements	Sheri Brenner	<a href="mailto:sheri.brenner@willbros.com">sheri.brenner@willbros.com</a>	499-3741
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