MEETING NOTICE

The Association for Accountants and Financial Professionals in Business

BOSTON / WORCESTER / NORTH SHORE / MASS RT.128

COLLABORATIVE CHAPTERS

DINNER MEETING –WEDNESDAY–FEBRUARY 15, 2012

NETWORKING HOUR 5:30 PM – DINNER 6:30PM – SPEAKER 7:30PM

TOPIC:

ESTATE PLANNING

LOCATION:

Yangtze River Restaurant - 25 Depot Square - Lexington, MA - 781-861-6030
http://www.yangtzelexington.com
Parking is available in the adjacent municipal lot.

MEAL CHOICE:

CHINESE DINNER BUFFET

COST OF 1 CPE - $20.00 (PAY AT THE DOOR)

PLEASE RESERVE YOUR SEAT WITH AN E-MAIL TO JOE GOODWIN jngoodwin@comcast.net
OR CALL JOE AT 978-987-2784

PLEASE RESERVE BY FRIDAY, FEBRUARY 10TH

SPEAKERS:

RICHARD J. PETRUCCI, JR., J.D., CPA, CFP®

&

MARK KRUPKOWSKI

Mark Krupkowski Biography

Mark Krupkowski graduated from Boston College class of 1982 Magna Cum Laude

Has worked in the financial services industry since 1983

President, Merrimack Insurance & Retirement Planning Services, North Andover MA. The firm provides comprehensive financial, estate and employee benefit planning services to the corporate and individual marketplace.

The role of the firm is to provide business owners the opportunity to utilize one firm as their professional resource to manage their financial goals and objectives

Holds the following Professional Designations:

Certified Financial Planner (CFP) – 1987

Chartered Life Insurance Underwriter (CLU) – 1990

Chartered Financial Consultant (ChFC) – 1991

Investment Advisory Representative

Holds Series 6, 63, 65 & 7 securities licenses

Richard J. Petrucci Jr. Biography

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Rick Petrucci focuses in the areas of estate planning, business succession planning, financial planning, executive compensation planning, taxation, asset protection planning, special needs planning, and elder law.

Rick's creativity, experience, and resourcefulness enable him to work well with our clients and their professional advisors in order to implement responsive solutions for financial objectives.

Previously, Rick had been an estate planning attorney in private practice, an estate and business planning attorney with a national insurance company, and a tax lawyer with an international accounting firm.

In addition to being an attorney, Rick is also a CERTIFIED FINANCIAL PLANNER™ certificant and a Certified Public Accountant.

Rick graduated from Bryant University with a B.S. in Business Administration (Accounting and Finance) in 1988 and from Hofstra University School of Law in 1991.

Rick is a member and past Co-Chairperson of the Probate & Trust Committee of the R.I. Bar Association; a member and past Chairperson of the Financial Planning Association, Rhode Island Chapter; and a member of the Estate Planning Council of Rhode Island, the R.I. Society of Financial Service Professionals, and the Parish Finance Council of Holy Apostles Church in Cranston, Rhode Island.

Rick is frequently quoted in national and local publications, including *Forbes*, *MarketWatch*, and *Providence Business News*.