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ESTATE PLANNING COUNCIL, INC.**
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A Capital Markets and Economic Outlook for 2025 and Beyond!

Date: Wednesday, September 17, 2025

Time: 11:30 am – 1:30 pm

Location: Bacari Grill (800 Ridgewood Rd; Township of Washington, NJ 07676)

Speaker: Heather L. Kidde, CFA; Senior Vice President, Senior Wealth Manager/Portfolio Manager; BNY Mellon Wealth Management

LIVE EVENT ONLY!

So what's going on with capital markets? More important, how about the economy? Even bigger, what's going on in the world? The United States is still seeing and feeling the impact of the pandemic – financially, economically, politically, and more. Aside from that, there is perhaps more going on today than ever before. The heightened feelings and fears of the US economy, inflation, recession, taxes, formerly increasing interest rates and now the inherent interest rate reductions – and more – and what does this mean for capital markets and the economy. Most recently, capital markets have been behaving very favorably. The outlook for 2025 improved greatly from the last quarter of 2024, through the first and second quarters of 2025. President Trump took office, the looming sunset provisions were eliminated (at least for now) and we've seen a brand new tax bill passed. So what does all this mean? We have seen capital markets reach all-time highs, then regress and pull back, and now we at all-time highs again! Is this recovery or another bull market? Is this capitulation or signs of another correction? Well, there is nobody better to answer all of these questions and to give us "A Capital Markets And Economic Overview For 2025 And Beyond" than our very special speaker!

The Greater New Jersey Estate Planning Council is very proud and very excited to have back Mrs. Heather Kidde, CFA; Senior Vice-President, Senior Wealth Manager/Portfolio Manager; BNY Mellon Wealth Management. She will join us live for our council-year kick-off special event! Mrs. Kidde is a well-known and well-respected industry veteran, and her speaking engagements are normally reserved for private and very special events. In addition, aside from being a portfolio manager, she is based inside the BNY Mellon Wealth Management division. That means – like us – she is responsible for and works directly with HNW individuals, wealthy families, to address and manage their investment and wealth management planning. Mrs. Kidde also works with the BNY Mellon Wealth Management thought leaders and specialist teams, so she has a very unique insight and perspective on the global economies, especially capital markets, and the world around us today – and what all of this means to our clients!

Heather Kidde will be with us – live and in-person – as this will be a LIVE ONLY EVENT. Many of you may recognize Mrs. Kidde's name as a well-known and well-respected industry veteran. Prior to joining BNY Mellon Wealth Management, she was a Portfolio Manager for Northern Trust

where she also worked with HNW families and individuals in managing and planning for their investments and wealth management. Prior Northern Trust, Heather was an integral part of an asset management team at both Credit Suisse and Advisory Research. Mrs. Kidde received a bachelor's degree from Colgate University and is a Certified Financial Analyst (CFA).

This is going to be a "Don't Miss" event and a kick-off to a great and exciting 2025-2026 GNJEPC year! Register Now!!!

REGISTRATION INSTRUCTIONS:

Please register at: <https://www.eventbrite.com/e/a-capital-markets-and-economic-outlook-for-2025-and-beyond-tickets-1626888741019?aff=oddtcreator> to reserve your ticket and to let us know your CE requirements.

NOTE: If you have not renewed yet for the 2025-2026 year, you will need to purchase a Non-Renewed Member ticket or renew your membership ASAP.

Applications are pending for 2.0 continuing education credits for CFP, NJ CLE, and NJ CPE. If you wish to receive CE credits, you must provide the necessary license information, and you must attend the full course.