J.R. Burke, Founding Principal of Perspective Financial Group, Elected President of Philadelphia Estate Planning Council

BERWYN, PENNSYLVANIA, [June, 2018]—Perspective Financial Group is pleased to announce that J.R. Burke has been elected President of the Philadelphia Estate Planning Council, one of the oldest and largest estate planning councils in the country. J.R. is the Founding Principal of Perspective Financial Group (Perspective), which is a Member Firm of M Financial Group.

The Philadelphia Estate Planning Council (PEPC) is a highly recognized interdisciplinary organization for professionals involved in estate planning, providing its members with opportunities to enhance their skills and expand their network through programs and interaction. Membership includes more than 700 attorneys, accountants, trust administrators, financial planners, insurance agents, investment advisors, appraisers, and planned giving professionals throughout the Greater Philadelphia area. The President, elected at the annual meeting, serves for one year.

J.R. Burke commented: "It is a genuine honor to serve as PEPC President, an organization that has meant so much to my firm and my clients for many years. In addition to the valuable work already in motion, the passage of the Tax Cuts and Jobs Act late last year provides additional opportunity for the PEPC to elevate our education and advocacy. It will be a privilege to continue my service during this exciting time."

The PEPC is a member of the National Association of Estate Planners & Councils, the leading professional organization for estate planners. The Association provides its 2,000 Accredited Estate Planner® designees, and more than 270 affiliated local estate planning councils and their 30,000 members, with ongoing education and a forum for professional networking.

In 2017, the PEPC was awarded the Leonard H. Neiman and Walter Lee Davis, Jr. Council of Excellence Award, which is the highest honor available to an estate planning council affiliated with the National Association of Estate Planners & Councils. This award was created to recognize councils that are successful in their efforts to provide a strong multi-disciplinary environment for estate planning professionals within their community, and is intended to honor those councils that truly work to grow their programs and services and to provide an exceptional member experience.

J.R. graduated from the Wharton School of the University of Pennsylvania with a BS in economics and a major in insurance in 1976. He earned the Chartered Life Underwriter (CLU®) designation prior to his graduation and also holds the Chartered Financial Consultant (ChFC®), Certified Financial Planner (CFP®), and (AEP®) Accredited Estate Planner designations.

A resident of Berwyn, Pennsylvania for more than 30 years, J.R. is married with four sons. He remains actively involved in his community through multiple local and charitable organizations, including Elwyn, a human services organization meeting the needs of mentally, emotionally and physically challenged people.

About Perspective Financial Group

Perspective offers a customized approach to services and products for personal wealth management, family wealth transfer, business continuity and transition planning, and executive and employee benefits. Perspective combines technical expertise, relationships, and perspective to guide clients in a service-oriented manner, and operates their business within the pillars of business ethics, regulatory compliance, and corporate responsibility.

For more information about Perspective, please visit www.pfg1976.com. For more information about M, please visit www.mfin.com.