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**'She was a wonderful person,
and the University was
important to her.'**

**—Jeffrey Kahn (left)
of Joyce Boyer (inset)**



Probate & Pumpnickel: Lunch & learn sessions serve as legacy for friend of the University

When attorneys and CPAs gather for the educational luncheon series Probate and Pumpnickel, they continue a tradition begun by the late Joyce Boyer, a well-known trust officer and longtime friend of Palm Beach Atlantic.

"Joyce just got such a kick out of helping people and people learning," said attorney Jeffrey Kahn, who spoke at a recent Probate and Pumpnickel luncheon. Kahn, with the firm Greenberg Traurig, gave a presentation on employee stock ownership plans.

Each month Probate and Pumpnickel offers a program on topics such as estate planning, taxation and elder law. Attorneys and CPAs attending the free luncheons receive continuing education credits.

"Some of the topics are super timely," said Kahn, because of the frequent developments and changes in the regulations of such fields.

PBA acquired Probate and Pumpnickel after Boyer's death in 2012. She started the program more than 30 years ago. Kahn, who has participated in the program for 20 years, recalled Boyer's "touch" in putting people at ease and offering questions to help the experts "get right down to the practical thing."

"She was a wonderful person," said Kahn, "and the University was important to her."

The University continues the program with coordinator Lisa Aaron, who recruits speakers and arranges locations. Through the program PBA

develops relationships with key professionals helping clients with their financial planning. In this way those clients can learn more about the many philanthropic opportunities at the University.

Luncheons run for less than 90 minutes, and have been offered in West Palm Beach, Fort Lauderdale, Boca Raton, Naples, Sarasota and Greenville, South Carolina.

In South Carolina UBS Financial Services sponsors the luncheons, thanks to PBA alumnus Michael Lee '90, UBS senior vice president and senior portfolio manager. He became involved in Probate and Pumpnickel when he and Boyer both worked at Comerica Bank.

When Lee moved to Greenville five years ago, Boyer invited him to start a Probate and Pumpnickel branch there. He continues with the program today, having seen how well it provides financial and legal professionals with continuing education and opportunity to network and develop referral sources.

Other sponsors for the luncheons include Sabadell Bank and Trust, West Palm Beach; BNY Mellon Wealth Management, Naples; Monarch Wealth Managed Well and Canandaigua National Trust Company of Florida, Sarasota.

Probate & Pumpnickel details:
learn-well.pba.edu/p-and-p