

Estate Planning Council of Lower Fairfield County, Inc.
MEETING NOTICE

Topic: **Fiduciary Best Practices**

Speaker: **Peter B. Guenther, CTFA, Director of Fiduciary Services, Cummings & Lockwood LLC**

Date & Time: **Wednesday, May 7, 2014 – 5:45 p.m. – 8:45 p.m.**

Place: **Innis Arden Golf Club, 120 Tomac Avenue, Old Greenwich, CT**

Dear Council Member:

We are pleased to announce that **Peter B. Guenther, CTFA, Director of Fiduciary Services, Cummings & Lockwood LLC**, will be our guest speaker on the subject of *Fiduciary Best Practices* at our May 7th Annual Meeting & Dinner Program. Cash bar and cocktails will begin at 5:45 p.m., followed by dinner promptly at 6:30 p.m., speaker at 7:30 p.m., and we anticipate an end to the meeting between 8:30 p.m. and 8:45 p.m. (***IMPORTANT: Please note that the date of this meeting is one week earlier than was originally published last year.***)

This presentation will be an in-depth review of Fiduciary Best Practices, including discipline, documentation and process, investment risk, investment documentation, trust risk, and discretionary distributions as well as a discussion of case law.

Peter B. Guenther joined Cummings & Lockwood as the Director of Fiduciary Services in the firm's Private Clients Group in 2012. Peter's experience comes from a long career in private banking in Fairfield County, Connecticut, with a focus on trust and estate services. He began working for Union Trust in Stamford, Connecticut, and has held senior officer positions with organizations such as Shawmut Bank, PNC Bank New England, Fleet National Bank and Webster Bank. Peter has been involved in all aspects of personal banking including trust and estate planning, investment policy, trust administration, tax planning, compliance and operations. He has also worked extensively with bank auditors, and state and federal examiners. Peter received his B.A. from Wesleyan University. He is a graduate of the Williams College School of Banking, and the National Graduate Trust School at Northwestern University, from which he received the CTFA designation.

Space is limited, so we suggest that you reserve a place for yourself and your guest(s) by completing and returning the tear sheet below as soon as possible and no later than Wednesday, April 30th. Please let us know in advance if you subsequently find that you or your guest will be unable to attend.*

IMPORTANT REMINDERS:

Continuing Education Credits: We will be offering CEUs, at \$40 per credit hour, for our CPA and CFP® designated members attending our breakfast and dinner meetings as well as for CPA and CFP® designated guests attending our dinner meetings. **Requests for CEUs should be indicated on the individual program announcement registration form at the bottom of this page and the CE fee must be paid in advance by check.** **CE UPDATE: This presentation has been accepted for one (1) hour of continuing education credit by CFP Board of Standards.** We will submit the course attendance roster online after the meeting. We will also provide Certificates of Attendance to those attendees requiring CPA CEs for their self-reporting purposes.

Guest Attendees: Effective as of our October 2013 program, the guest fee is \$75. In addition, effective as of our May 2013 program, guest attendance by a professional colleague is limited to two dinner meetings within a two-year period. Eligible guests and professionals that work or live in Fairfield County can apply for EPC-LFC membership by completing a membership application, accessible on our website (www.epclfc.org). Questions regarding membership or the application process can be addressed by Matt Bovino, 1st Vice President, Membership, at 203-966-8759 or MABovino@DavidsonDawson.com.

I have enjoyed serving as your Program Chair this year and hope that you have found the topics and speakers to be beneficial. If you have any ideas for future programs, please contact our incoming Programs Chair Elizabeth Cahill at elizabeth.a.cahill@ustrust.com.

Finally, please be sure to visit our website at www.epclfc.org for details as they become available on our 2014-2015 program season!

See you May 7th!

Alessandra DiMauro
Second Vice President, Programs

**To cancel, please call Lori Somerville at 877-302-6300.*

HOW TO REGISTER:

If you DO NOT require CE AND are NOT bringing a guest:

Please email your RSVP to EPC-LFC@comcast.net or call Lori Somerville at 877-302-600.

If you DO require CE AND/OR if you ARE bringing a guest:

If you require CE, the fee is \$40.

If you are bringing guest(s), the registration fee is \$75 per guest or, if they require CE, \$115 per guest.

All CE fees must be paid in advance.

Please complete the registration form below and mail it with your check payable to "EPC/LFC" to:
EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

REGISTRATION FORM

Member name: _____ **Phone:** _____

I REQUIRE CFP CE: CFP Certificant # _____ and/or last 4 digits of SSN#: _____

I REQUIRE CPA CE

IMPORTANT: For registration/badge purposes, please provide guest name, firm, designations, and professional category.

Guest name: _____ **Nickname for Badge:** _____

Firm: _____ **Town:** _____

Phone: _____ **Email:** _____

Designations: J.D. Esq. CFP® CPA CLU ChFC Other _____

MY GUEST REQUIRES CFP CE: CFP Certificant # _____ and/or last 4 digits of SSN# _____

MY GUEST REQUIRES CPA CE

Guest name: _____ **Nickname for Badge:** _____

Firm: _____ **Town:** _____

Phone: _____ **Email:** _____

Designations: J.D. Esq. CFP® CPA CLU ChFC Other _____

MY GUEST REQUIRES CFP CE: CFP Certificant # _____ and/or last 4 digits of SSN# _____

MY GUEST REQUIRES CPA CE

Guest name: _____ **Nickname for Badge:** _____

Firm: _____ **Town:** _____

Phone: _____ Email: _____

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