

ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.

Dear Council Member,

We are pleased to announce that **Jamie Mendelsohn, Executive Vice President, Ashar Group, LLC**, will be our guest speaker on the topic of “**Maximizing Value to Policy Owners: The Role of Life Settlements and Life Insurance Valuations in Planning**” at our first virtual “breakfast” meeting of the New Year on **Wednesday, January 18, 8:30 a.m. to 9:15 a.m. followed by networking from 9:15 a.m. to 9:30 a.m.**

The presentation is designed to help identify when the life settlement option could be viable and/or additional life insurance valuation data points might be relevant and a good solution for clients. Our presenter will provide information and perspective on the following topics:

- The current life settlement market, its participants and client profiles.
- Alternative life insurance valuation options for estate, business, tax, matrimonial disputes, and charitable planning situations.
- Case studies of sales and valuations with trusts, business, individual, and charity owned policies.
- Current tax treatment and regulation with regard to life settlement transactions.
- Professional responsibility and documentation overview
 - The opportunity to generate cash flows for other planning needs for clients, while also mitigating potential risk and liability regarding discarding or lapsing a valuable piece of property.

Please join us for the opportunity to learn more about the importance of treating life insurance like you would treat other ordinary property.

As Executive Vice President of Ashar Group, LLC, a life settlement broker and life insurance valuation firm, Jamie helps advanced planners and fiduciaries integrate life insurance policy valuations into their comprehensive planning process. She spends much of her time educating the financial services community at conferences, estate planning councils, and wealth management firms nationwide. [Click here](#) for speaker bio.

Guest Attendees:

The guest fee is \$50 to attend our breakfast webinars and guest attendance by a professional colleague is limited to two events (virtual and/or in person) within a two-year period. Eligible guests and professionals that work and/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 Travis L. Hood, CPA/PFS, our First Vice President, Membership, at 203-327-5717 or Travis@kahansteiger.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Monday, January 16th.

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2022-2023 program season!

We hope you will join us on January 16th!

With best regards,

Todd N. Robison, CLU®
Second Vice President, Programs

If you are NOT bringing a guest: Please register via reply email to epc-lfc@comcast.net or call our Council Administrator Lori Somerville at 877-302-6300. You will receive a confirmation email with instructions to join the meeting a day in advance.

If you ARE bringing a guest: There is a registration fee of \$50 per guest, payable by check or through your bank account via Zelle. To register your guest, you may mail the form, or you can complete, scan and email the form or provide the requested information within the body of an email to epc-lfc@comcast.net. Important: Emails must be provided for guests to receive the confirmation email with instructions to join the meeting.

To pay by check: Please mail your check made payable to "EPC-LFC" to: EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

To pay via your bank account using Zelle: Click on "Send Money"; in the "Recipient Name" field enter "Estate Planning Council"; then in the "email field" enter the council's email address epc-lfc@comcast.net; then click on "Add Recipient"; next enter the dollar amount.

REGISTRATION FORM

Member name: _____ **Phone:** _____

Guest name: _____

Firm: _____

Phone: _____ Email: _____

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

Guest name: _____

Firm: _____

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