

ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.

Dear Council Member,

We are pleased to announce that **Pierre duPont, Partner, Cerity Partners**, will be our guest speaker on “*Establishing Traditions of Family Communication to Achieve a Successful Outcome in an Estate Plan*” at our virtual “breakfast” meeting on **Wednesday, January 20th, 8:30 a.m. to 9:30 a.m.**

Projecting wealth to descendants is going to be more successful if you establish traditions of safe, open and inclusive family communications about and around the wealth. Too often, professionals set up the legal structures and the tax strategies and then move assets around at which point the client says “all good; done!” - but puts everything in a drawer. Without regularly revisiting (within the family more than anything) the structures and documents and objectives, without on-going awareness within the family of how the ‘wealth’ will be handled and even what the wealth is, there are likely to be greater challenges at the time of the next generational change.

Pierre duPont is a Partner in Cerity Partners’ New York office and has more than twenty-five years of experience founding, investing in and providing strategic growth advice to early-stage and middle-market companies. In addition to mentoring executives, Pierre has advised business-owning individuals and families on the personal/ownership side, as he has experienced many inheritances and business-ownership situations in his own family. [Click here](#) for speaker bio.

Guest Attendees:

Due to the fact that we’ve had to move to all virtual programming, guests are welcome to attend our breakfast webinars at no charge. However, our guest policy remains essentially the same: guest attendance by a professional colleague is limited to two *virtual* events 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 Robin Sherwood, CFP®, our First Vice President, Membership, at 203-972-8262 or robin@htgadvisors.com.*

Please see below for registration details for members and guests. Note, registration deadline is Monday, January 18.

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2020-2021 program season!

We hope you will join us on January 20th!

With best regards,

Alva J. Carter-Hasan
Second Vice President, Programs

IMPORTANT REMINDER:

The deadline to pay your 2020-2021 membership dues was September 30th. If you have not yet received your dues renewal notice via email, please contact our Council Administrator Lori Somerville at 877-302-6300 or epc-lfc@comcast.net to request a duplicate notice. Thank you.

If you are NOT bringing a guest: Please register via reply email to EPC-LFC@comcast.net or call 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: Please register your guest by completing and emailing the registration form below, or providing the requested information within the body of an email to EPC-LFC@comcast.net, or calling Lori Somerville at 877-302-6300.

IMPORTANT: Emails must be provided in order for guests to receive the confirmation email with instructions to join the meeting a day in advance.

REGISTRATION FORM

Member name: _____ **Phone:** _____

Guest name: _____

Firm: _____

Phone: _____ Email: _____

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

Guest name: _____

Firm: _____

Phone: _____ Email: _____

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

Guest name: _____

Firm: _____

Phone: _____ Email: _____

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

Guest name: _____

Firm: _____

Phone: _____ Email: _____

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