

## ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.

Dear Council Member,

We are pleased to announce that [Susan W. Ylitalo, JD](#), Day Pitney LLP, & [Michael T. Clear, JD](#), Wiggin & Dana, will be our guest speakers on the topic of “*Estate Planning for the Business Owner*” at our “members only” breakfast meeting on Wednesday, January 23, 8:00 a.m. to 9:00 a.m., at the Day Pitney offices located at One Canterbury Green, 201 Broad Street, 7<sup>th</sup> Floor, in Stamford.

Our presenters will lead a discussion covering both fundamental and advanced estate planning strategies for our business owner clients. They will outline how business owners can use various strategies to facilitate business succession, reduce income, gift, and estate tax liabilities, and address family concerns. The discussion will review some of the more common estate planning strategies, including testamentary tax planning, buy/sell agreements, insurance, use of valuation discounts, IDGTs, GRATs, and CRTs.

**Advance registration is required (due to building security protocol) and reservations to attend can be made by contacting me by email ([jmpagnillo@daypitney.com](mailto:jmpagnillo@daypitney.com)); “first come, first served.”** As a courtesy to those who attend, we request that cell phones be silenced during the session. **We also request that “No Shows” be minimized.** Please feel free to bring coffee, tea, bagels, etc. to the meeting.

**PARKING:** You will need to pull a ticket to enter the parking garage. Parking spaces should be available in the area marked “Visitor Parking”. If no spaces are available in the Visitor Parking area, park anywhere that is not marked with a reserved sign. Upon entry into building, take the elevator to “L”, stop at the Security Guard’s desk, who will sign you in and direct you to the elevators for access to our office. Press the 7th floor and see our Receptionist, who will give you a validation ticket for exiting the parking garage.

If we must cancel a breakfast meeting, an email will be sent to all registrants for whom we have an email address and we will make every effort to contact all registrants by phone as well. If you are unable to check your email or voice messages, please visit our website at [www.epclfc.org](http://www.epclfc.org) where the cancellation announcement will be posted on our home page under “Next Meeting.” Except in unusual circumstances, we would know about the cancellation by 4:00 p.m. the afternoon prior to a breakfast meeting.

Finally, please be sure to mark your calendars for our next dinner program on Wednesday, February 20th, at The J House in Greenwich.

With best regards,

Jennifer M. Pagnillo  
Second Vice President, Programs