

ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.

Dear Council Member,

We are pleased to announce that **Ross E. Bruch, Senior Wealth Planner, Brown Brothers Harriman & Co.**, will be our guest speaker on the topic of *"Planning on AI: The Future of Estate Planning in the Age of Artificial Intelligence"* at our virtual "breakfast" meeting on **Wednesday, November 13, 8:30 a.m. to 9:15 a.m. followed by networking from 9:15 a.m. to 9:30 a.m.**

As a Senior Wealth Planner in the Philadelphia office, Ross works with and advises successful individuals and business owners on the preservation, growth, and transfer of wealth. His presentation will explore how AI is poised to revolutionize the way we approach estate planning by automating routine tasks, providing personalized advice, and ensuring compliance with evolving regulations. The predictions to be discussed, from personalized estate planning advice to continuous estate plan monitoring, will illustrate the wide-ranging impact AI can have on estate planning.

As law firms navigate the complexities of incorporating AI, it is crucial to develop and implement ethical policies that ensure transparency, data privacy, and regulatory compliance. Addressing client privacy concerns and maintaining rigorous security measures will be key to fostering trust and ensuring responsible AI use.

The future of AI in estate planning and the broader legal field is both uncertain and promising. As AI technology continues to evolve, it will undoubtedly bring new opportunities and challenges. Staying informed about advancements, exploring innovative AI tools, and embracing the potential of AI will be essential for legal and other estate planning professionals seeking to enhance their practice and deliver exceptional value to their clients.

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 Christopher Martens, CIC, CWCC, CPRIA, 1st Vice President, Membership, at Christopher.Martens@AssuredPartners.com.

Please reserve a place for yourself and your guest(s) by registering no later than Monday, November 11th.

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2024-2025 program season!

We hope you will join us on November 13th!

With best regards,

Stefania L. Bartlett, Esq.
Second Vice President, Programs

TO REGISTER:

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.

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 on how 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: _____

Phone: _____ Email: _____

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