

ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.

Dear Council Member,

We are pleased to announce that **Roosevelt D. Bowman is a Senior Investment Strategist with Bernstein's Wealth Strategies Group**, will be our guest speaker on the topic of "*Global Capital Market Update – The Impact of Inflation and Interest Rates, The Mid-Term Elections, and Global Unrest*" at our virtual "breakfast" meeting on **Wednesday, November 16th, 8:30 a.m. to 9:15 a.m. followed by networking from 9:15 a.m. to 9:30 a.m.**

One of the many interesting things about our presenter is that, having worked at the Federal Reserve for a number of years, he brings a unique perspective when addressing this topic. Roosevelt is a member of his firm's Private Client Investment Policy Group, which provides asset allocation, investment and risk management advice for high-net-worth clients, endowments and foundations. He began his investment career at Bernstein in 2000 and re-joined the firm in 2019.

Roosevelt brings 20 years of experience in investment research and portfolio management with a focus on global fixed income, monetary policy, and data science. Prior to returning to Bernstein, Roosevelt was head of foreign exchange trading and strategy at MetLife, where he was a portfolio manager and conducted fundamental and quantitative global macroeconomic research. Prior to that, he was a senior fixed income strategist at U.S. Bank for retail and institutional clients. Before that, Roosevelt was a research analyst at the Federal Reserve Bank of New York, and his work has been featured in prominent media and economic research publications. Roosevelt earned a BA degree in economics from Williams College and an MBA from New York University. In his free time, he tutors elementary- to middle-school children at New Jersey Cares.

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, November 14th.

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

There is a registration fee of \$50 per guest; therefore, please mail a copy of the registration form along 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:** _____

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 _____