

**ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.**  
**NOTICE OF 11/18/09 BREAKFAST MEETING**

Dear Council Member,

***Do's & Don'ts of Valuation*** will be the subject of our **Breakfast Meeting** on **Wednesday, November 18**, featuring guest speaker **Carolyn Armbrust, MBA, AIBA, ASA, Principal/Owner of The Axxess Group.**

With over 14 years in conducting business valuation and financial advisory engagements, Ms. Armbrust has analyzed a variety of business agreements that impact the value of a company or shareholder's interests, rights, and restrictions. To provide some guidance to professional practicing in estate planning and wealth management, Ms. Armbrust's presentation will include a comprehensive review of the do's and don'ts in drafting agreements, from the perspective of increasing or decreasing the value of a closely held company or a shareholder's ownership interest.

With 25 years of corporate development, valuation consulting, and financial advisory experience, Carolyn Armbrust has participated in over 100 business transactions, formations, and valuations. Ms. Armbrust, and her firm, The Axxess Group, serves business owners, investors, and their legal, tax, and auditor advisors for a variety of valuation and transaction purposes. Ms. Armbrust conducts business valuations and litigation support for mergers and acquisitions, financial reporting, shareholder dispute resolutions, estate planning and settlement, marital dissolutions, and other purposes. On average, Ms. Armbrust's client companies range in size from \$5 million to \$50 million in annual revenue. Ms. Armbrust is an accredited business appraiser, with professional designations from the American Society of Appraisers and the Institute of Business Appraisers. She is currently in her second term as President of the Connecticut Chapter of the American Society of Appraisers, and is the acting Secretary of the Estate Planning Council of Lower Fairfield County. Ms. Armbrust holds a BA degree in International Business and Foreign Languages and an MBA in Strategic Planning and Business Policy. She is the principal and owner of The Axxess Group, a Connecticut-based business valuation consulting and financial advisory services firm, established in 2001. Her prior professional experience includes investment banking roles at The Compass Group and DeSilva & Phillips, and international and domestic business development roles with Reed Exhibitions, a division of Reed Elsevier.

**Council Breakfast Meetings are held at the Westport Public Library (Arnold Bernhard Plaza – Levitt Pavilion Main Entrance), Westport, Connecticut, from 8:00 a.m. to 9:00 a.m. The library has asked that members arrive promptly at 8:00. They open the door for us at 8:00 even though the library doesn't open until 9:00.** Since the library will open early to accommodate us, their Coffee Shop will not be open for service during our meeting. Please feel free to bring coffee, tea, bagels, etc. to the meeting. There is a Starbucks Coffee diagonally across from the Westport Library on the Post Road and Oscar's Deli is located on Main Street. **Breakfast Meeting participation is free and limited to Council Members** – no guests – and attendance is limited to twenty-five (25) individuals to encourage active discussion.

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.

**Reservations to attend can be made by contacting me by email ([james.dean@lfg.com](mailto:james.dean@lfg.com)) or by telephone (914-305-9043); "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.**

Finally, **if you haven't already registered for our dinner meeting this Wednesday, October 28th, please do so today!** And please mark your calendars today for our dinner program on **Wednesday, December 9, at Innis Arden, featuring Todd Angkatavanich, Esq., & Edward A. Renn, JD, Withers Bergman LLC.** Complete details forthcoming shortly and will be posted on our website at [www.epclfc.org](http://www.epclfc.org).

With best regards,

James H. Dean, CLU, ChFC  
Second Vice President, Programs