

# ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.

Dear Council Member,

We are pleased to announce that **John L. Varga, III, AM, Managing Director/Partner with MPI**, will be our guest speaker on the topic of *"The Cryptocurrency Landscape for the T&E Community - Fall 2023 Edition"* at our virtual "breakfast" meeting on **Thursday, December 7, 8:30 a.m. to 9:15 a.m. followed by networking from 9:15 a.m. to 9:30 a.m.**

Our presenter will share his experience with a range of appraisal projects involving cryptocurrencies, with an emphasis on charitable gifting, estate tax filing, and intra-family gifts and sales. Specifically, John will discuss the regulatory environment as it affects the types of documentation and acceptable valuation methodologies. He'll also address the question, Why is a Qualified Appraisal required? and will do a deep dive into CCA Memo Number 202302012 (qualified appraisal requirement for charitable contributions of cryptocurrency).

John is a Partner at MPI and is based in the firm's New York City office. Since joining MPI, John has determined the value of closely held securities of companies for a variety of purposes, including estate and gift taxes, income taxes, sale and merger, stock purchase plans, buy-sell agreements, ownership succession, Employee Stock Ownership Plans and corporate and shareholder planning. John has extensive valuation experience in many industries including complex real estate development and management organizations, technology firms (including start-up phase companies) and manufacturers of equipment and components for the automotive, consumer and industrial sectors. The valuation analyses and reports prepared by John have been used for presentations to management, directors, and stockholders of client companies, as well as to attorneys, accountants, and bank trust representatives.

## **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](http://www.epclfc.org)). Questions regarding membership or the application process can be addressed by William Murray, CPA, CFF, ASA, ABV, 1st Vice President, Membership, at [wmurray@mpival.com](mailto:wmurray@mpival.com).

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Tuesday, December 5th.

Finally, please be sure to visit our website at [www.epclfc.org](http://www.epclfc.org) for more details as they become available on our 2023-2024 program season!

We hope you will join us on December 7<sup>th</sup>!

With best regards,

Travis L. Hood, CPA/PFS  
Second Vice President, Programs

## **IMPORTANT REMINDER:**

The deadline to pay your 2023-2024 membership dues was October 15th. 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](mailto:epc-lfc@comcast.net) to request a duplicate invoice. Thank you.

**If you are NOT bringing a guest:** Please register via reply email to [EPC-LFC@comcast.net](mailto: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](mailto:epc-lfc@comcast.net). **Important:** Emails must be provided for guests to receive the confirmation email with instructions 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](mailto:epc-lfc@comcast.net); then click on "Add Recipient"; next enter the dollar amount.

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### 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:** \_\_\_\_\_

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

**Guest name:** \_\_\_\_\_

Firm: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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