

ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.
NOTICE OF 3/10/10 BREAKFAST MEETING

Dear Council Member,

Roth IRA Conversion in 2010: Why and How? will be the subject of our **Breakfast Meeting** on **Wednesday, March 10**, featuring guest speaker **Douglas H. Olin, J.D., LL.M., Cummings & Lockwood LLC**.

The 2010 Roth conversion presents advisors and clients with tremendous opportunities. This presentation will review the detailed analysis advisors must perform with each and every client who has assets in a traditional retirement account, the tax consequences and considerations of conversion and the cautionary disclosures that cannot be ignored.

Douglas H. Olin is a principal in Cummings & Lockwood's Private Clients Group. His practice focuses on estate planning, family business succession planning, and estate and trust administration. Doug speaks frequently on estate and tax planning topics to both lawyer and non-lawyer audiences. He received his B.B.A. in accounting, with distinction, in May 1990 from Emory University in Atlanta, Georgia. He attended New York University School of Law, where he received his J.D. in 1993 and his LL.M. in Taxation in 1995. Doug is admitted to practice in Connecticut and New York and is a member of the Connecticut, New York and Greenwich Bar Associations. He is also a member of the Estate Planning Council of Lower Fairfield County. Doug was a 2006 recipient of the Fairfield County Business Journal "40 under 40" Award which recognizes extraordinary business leadership and success in the field of law. Doug lives in Weston, Connecticut, with his wife and two children.

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 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) 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, please note that our dinner program featuring **Gideon Rothschild, Esq., Moses & Singer LLP**, on ***Asset Protection – Keeping It All In The Family*** has been rescheduled for **Wednesday, March 31**, at **Giovanni's II**. An updated program announcement will be forthcoming shortly via separate email and is currently posted on our website at www.epclfc.org.

With best regards,

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