

ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.

Dear Council Member,

We are pleased to announce that **Dennis Ladd, Vice President and Charitable Planning Consultant at Fidelity Charitable®**, will be our guest speaker on the topic of *"Creative Charitable Planning Strategies for 2024"* at our virtual "breakfast" meeting on **Wednesday, March 13, 8:30 a.m. to 9:15 a.m. followed by networking from 9:15 a.m. to 9:30 a.m.**

How are your clients giving to charity and could they be giving in more innovative ways? As their trusted advisor, you can introduce timely planning strategies for smarter philanthropy-strategies that maximize their charitable giving while potentially minimizing their tax exposure. Our presenter will discuss charitable planning approaches that target clients across different stages of life, from young investors to retirees. [Click here](#) for speaker bio.

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 William Murray, CPA, CFF, ASA, ABV, 1st Vice President, Membership, at wmurray@mpival.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Monday, March 11.

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

We hope you will join us on March 13th!

With best regards,

Travis L. Hood, CPA/PFS
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: _____

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