

# ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.

Dear Council Member,

We are pleased to announce that **Michael Gregory NSA, CVP, ASA, CVA, founder/owner, Michael Gregory Consulting, LLC, and Qualified Mediator with the Minnesota Supreme Court**, will be our guest speaker on “*How to Avoid and What to do if Audited by the IRS*” at our virtual “breakfast” meeting on **Wednesday, March 23rd, 8:30 a.m. to 9:15 a.m. followed by networking from 9:15 a.m. to 9:30 a.m.** [Click here](#) for speaker bio.

A brief background on the IRS organization as it relates to the IRS Estate and Gift Tax Program and issues will be presented to provide participants with insight into the various silos and different cultures associated with business appraisal issues at the IRS. The processes of both the national and local classification process in Estate and Gift tax will be discussed and issues related to an examination will be explored to provide insight of what to do to avoid an audit and what to do with any conflict using neuroscience. The insights from neuroscience may be applicable to resolving any conflict and negotiating winning solutions by taking advantage of The Collaboration Effect.

At this end of this session, participants will be able to describe how the IRS works and how to work with this IRS, communicate how classification works at the IRS on estate and gift tax audits, and how to avoid an audit, identify how to work with IRS personnel if audited, and apply The Collaboration Effect.

## **Guest Attendees:**

Due to the fact that, for the time being, we’ve had to continue with all virtual programming, guests are welcome to attend our breakfast webinars at no charge. However, our guest policy remains essentially the same: guest attendance by a professional colleague is limited to two *virtual* events within a two-year period. *Eligible guests and professionals that work 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 Alva J. Carter-Hasan, our First Vice President, Membership, at 203-930-7129 or [alva.carter-hasan@bofa.com](mailto:alva.carter-hasan@bofa.com).

Please see below for registration details for members and guests. Note, registration deadline is Monday, March 21<sup>st</sup>.

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 2021-2022 program season!

We hope you will join us on March 23<sup>rd</sup>!

With best regards,

Todd N. Robison, CLU®  
Second Vice President, Programs

## **IMPORTANT REMINDER:**

The deadline to pay your 2021-2022 membership dues was September 30<sup>th</sup>. 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 notice. 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 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](mailto:EPC-LFC@comcast.net), or calling Lori Somerville at 877-302-6300.

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

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

**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 \_\_\_\_\_