

ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.

Dear Council Member,

We are pleased to announce that **Stephen M. Napier, Esq., Berkowitz, Trager & Trager, LLC**, will be our guest speaker on “*Wealth Transfer Strategies in Our Brave New World*” at our virtual “breakfast” meeting on **Wednesday, March 24th, 8:30 a.m. to 9:30 a.m.** Our program will kick off with networking at 8:30 a.m., following by the presentation from 8:45 a.m. to 9:30 a.m.

Stephen Napier, a member and chair of his firm’s Trusts & Estates Department, will discuss lifetime gifting strategies that can be used with clients to make use of their Connecticut and federal estate tax exemptions in light of potential tax reform. Stephen practices in the areas of tax and estate planning, trust and estate administration and business succession planning and regularly advises individuals, families and business owners on the development of tax-efficient and practical wealth management strategies, lifetime wealth transfer planning and business succession planning, including the preparation of wills, revocable living trusts and irrevocable trusts. He also helps guide fiduciaries and beneficiaries through the trust and estate settlement and administration process, including probate and contested estate matters. [Click here](#) to learn more about our speaker.

Guest Attendees:

Due to the fact that we’ve had to move to 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).* *Questions regarding membership or the application process can be addressed by Robin Sherwood, CFP®, our First Vice President, Membership, at 203-972-8262 or robin@htgadvisors.com.*

Please see below for registration details for members and guests. Note, registration deadline is Monday, March 22nd.

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2020-2021 program season!

We hope you will join us on March 24th!

With best regards,

Alva J. Carter-Hasan
Second Vice President, Programs

IMPORTANT REMINDER:

The deadline to pay your 2020-2021 membership dues was September 30th. 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 to request a duplicate notice. Thank you.

If you are NOT bringing a guest: Please register via reply email to 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, 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.

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 _____

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