

ESTATE PLANNING COUNCIL OF LOWER FAIRFIELD COUNTY, INC.

Dear Council Member,

We are pleased to announce that **John J. Connolly, Ed.D., President and CEO of Castle Connolly Medical Ltd**, will be the guest speaker and will talk about the *"Navigating the Maze: How to Provide High Level Health Advice & Support for High Net Worth Individuals, Families and Executives"* at our **"members only"** breakfast meeting on **Wednesday, March 9, 8:00 a.m. to 9:00 a.m.**, at the **U.S. Trust Offices located at One Gorham Island, 2nd Floor, in Westport.**

When it comes to high net worth individuals, executives, and their families, many wish to supplement their primary health care with higher level health advice and support but don't know how to go about it. During this one hour presentation, our speaker will talk about the options that should be considered when helping clients develop a comprehensive, high level health care support plan, such as:

- Access – 24/7 to a select team of board certified physicians for advice and guidance.
- Prevention/Wellness Coaching/Counseling
- Centralized Medical Records
- Student Protection Program
- Access to Medical Resources
- Overseas Medical Services

Castle Connolly LifeStream MD is a health advisory service, offering members exclusive 24/7/365 global access to world-class doctors, professional health advice, medical evacuation services and personal medical records anytime, anywhere. Its members are high net worth individuals, families and executives who seek a higher level of health advice and support. Dr. Connolly is the nation's foremost expert on identifying top physicians, as the publisher of "America's Top Doctors.®" Dr. Connolly served as President of New York Medical College, the nation's second largest private medical college, for more than ten years. He is a Fellow of the New York Academy of Medicine, a Fellow of the New York Academy of Sciences, a Director of the New York Business Group on Health, a member of the President's Council of the United Hospital Fund, and formerly a member of the Board of Advisors of the Whitehead Institute for Biomedical Research. Dr. Connolly holds a Bachelor of Science degree from Worcester State College, a Master's Degree from the University of Connecticut, and a Doctor of Education degree from Teacher's College, Columbia University.

Reservations to attend can be made by contacting me by email (elizabeth.a.cahill@ustrust.com); "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.**

Continuing Education Credits: As previously announced, we will no longer offer CFP CEUs. However, we will continue to provide Certificates of Course Completion to Certified Public Accountants who attend Council dinner meetings and breakfast seminars, upon request for their CPA CPE self-reporting purposes, at \$40 per credit hour.

Requests for CPA CPEs should be indicated on the program announcement registration form at the bottom of this page and the CE fee must be paid in advance by check.

Council Breakfast Meetings are held at the U.S. Trust Offices located at One Gorham Island, 2nd Floor, in Westport, from 8:00 a.m. to 9:00 a.m. Please feel free to bring coffee, tea, bagels, etc. to the meeting.

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.

Finally, please mark your calendar for our next **dinner program (Annual Meeting) on Wednesday, May 11**, at the Innis Arden Golf Club in Old Greenwich, featuring **Thomas J. Pauloski, National Managing Director in the Wealth Management Group of Bernstein Global Wealth Management, the research division of Bernstein's Private Client Group**, on *"Your Money and Your Life: Using Life Insurance to Stabilize a Portfolio."*

With best regards,

Elizabeth A. Cahill
Second Vice President, Programs

If you require CPA CE: CE fees must be paid in advance by check.

REGISTRATION FORM

Please complete this registration form and mail it with your check in the amount of \$40 payable to "EPC/LFC" to:
EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

Member name: _____ **Phone:** _____

I REQUIRE CPA CE