

Estate Planning Council of Lower Fairfield County, Inc.
MEETING NOTICE

Topic: Demystifying Probate Court Litigation: Spotting the client problems and improving the client odds; a primer for service providers and practitioners

Speaker: Steven P. DeRicco, Esq., Council Member, Whitman Breed Abbott & Morgan LLC

Date & Time: Wednesday, October 9, 2013 – 5:45 p.m. – 8:45 p.m.

Place: Giovanni's II/ The Water's Edge, 2748 Post Road, Darien, CT

Dear Council Member:

We are pleased to announce that **Steven P. DeRicco, Esq., Council Member, Whitman Breed Abbott & Morgan LLC**, will be our guest speaker on the subject of *Demystifying Probate Court Litigation: Spotting the client problems and improving the client odds; a primer for service providers and practitioners* at our October 9th Dinner Meeting at **Giovanni's II** in Darien. **Cash bar and cocktails will begin at 5:45 p.m., followed by dinner promptly at 6:30 p.m., speaker at 7:30 p.m., and we anticipate an end to the meeting between 8:30 p.m. and 8:45 p.m.**

The intent of this one-hour presentation is to provide some background on Probate Court Litigation to help attendees gain a basic understanding of the process and to identify some of the prevalent issues leading to Probate Court Litigation.

Steven DeRicco has over twenty years of experience as a trust & estate litigator and tax attorney with the firm at its former offices in New York City and current offices in Greenwich, CT and Westchester, N.Y. He represents Executors, Trustees, and Heirs in all aspects of practice in the Surrogate and Probate Courts in New York, Connecticut and New Jersey. Steven's expertise includes trials involving contested Wills and Trusts, disputes over ownership of decedent's property and business interests, contested Executor and Trustee Accountings, removal of Executors and Trustees, enforcement of spousal rights, and contested Guardianship/Conservatorship. He implements tax planning and wealth transfers through the preparation of sophisticated Wills and Trusts. Steven represents Executors, Trustees and individual clients before the IRS and State Revenue Agencies. [Click here](#) to read Steven's full bio.

IMPORTANT REMINDERS:

Continuing Education Credits: We will be offering CEUs, at \$40 per credit hour, for our CPA and CFP® designated members attending our breakfast and dinner meetings as well as for CPA and CFP® designated guests attending our dinner meetings. Requests for CEUs should be indicated on the individual program announcement registration form and the CE fee must be paid in advance by check. **CFP CE UPDATE: This presentation has been accepted for one (1) hour of continuing education credit by CFP Board of Standards.** We will be submitting the course attendance roster online after the meeting. We will also provide Certificates of Attendance to those attendees requiring CPA CEs for their self-reporting purposes.

Guest Attendees: Effective as of our October program, the guest fee will be \$75. In addition, effective as of our May 2013 program, guest attendance by a professional colleague is limited to two dinner meetings 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 Matt Bovino, 1st Vice President, Membership, at 203-966-8759 or MABovino@DavidsonDawson.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Wednesday, October 2nd. Please let us know in advance if you subsequently find that you or your guest is unable to attend.*

Finally, please be sure to visit our website at www.epclfc.org for complete details as they become available on our upcoming breakfast meetings and dinner programs.

See you October 9th!

Alessandra DiMauro

Second Vice President, Programs

****To cancel, please call Lori Somerville at 877-302-6300.***

HOW TO REGISTER:

If you DO NOT require CE AND are NOT bringing a guest:

Please email your RSVP to EPC-LFC@comcast.net or call Lori Somerville at 877-302-600.

If you DO require CE AND/OR if you ARE bringing a guest:

If you require CE, the fee is \$40.

If you are bringing guest(s), the registration fee is \$75 per guest or, if they require CE, \$115 per guest.

All CE fees must be paid in advance.

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

REGISTRATION FORM

Member name: _____ **Phone:** _____

- I REQUIRE CFP CE: CFP Certificant # _____ and/or last 4 digits of SSN#: _____
 I REQUIRE CPA CE

IMPORTANT: For registration/badge purposes, please provide guest name, firm, designations, and professional category.

Guest name: _____ **Nickname for Badge:** _____

Firm: _____

Phone: _____ Email: _____

Designations: J.D. Esq. CFP® CPA CLU ChFC Other _____

- MY GUEST REQUIRES CFP CE: CFP Certificant # _____ and/or last 4 digits of SSN# _____
 MY GUEST REQUIRES CPA CE

Guest name: _____ **Nickname for Badge:** _____

Firm: _____

Phone: _____ Email: _____

Designations: J.D. Esq. CFP® CPA CLU ChFC Other _____

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Firm: _____

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