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

Topic: **Recent Developments in International Trust & Estate Planning**, ***Covering FATCA, FBARs, Voluntary Disclosure Programs and Other Topics***

Speaker: **G. Warren Whitaker, Partner, Day Pitney**

Date & Time: **Wednesday, October 19, 2011 – 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 **G. Warren Whitaker, Partner, Day Pitney LLP,** will be our guest speaker on the subject of ***Recent Developments in International Trust & Estate Planning*** at our October 19th 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.**

In his presentation, Attorney Whitaker will discuss recent international developments including the Foreign Account Tax Compliance Act (FATCA), which imposes further reporting requirements on U.S. persons and also requires foreign banks to cooperate with the U.S.; Foreign Bank Account Report (FBAR) filings for U.S. persons with foreign accounts; the IRS's recent offshore voluntary compliance initiative for unreported accounts; and other recent international T&E developments.

Attorney Whitaker, a partner in the Individual Clients Department of Day Pitney, practices in the areas of complex domestic and international estate planning and related income tax, corporate, and personal planning for high net worth individuals and multinational families. Warren is the former U.S. chair of the U.K.-based Society of Trusts and Estates Practitioners (STEP) and a member of the STEP Worldwide Council. Warren is the former chair of the Trusts and Estates Law Section of the New York State Bar Association, a past chair of the Section's International Estate Planning Committee and Estate Administration Committee, and a former district representative. He is a fellow of the American College of Trusts and Estates Counsel (ACTEC) and its International Estate Planning Committee. He has written extensively in leading publications such as *Trusts and Estates, Probate and Property, and Estate Planning*, and has lectured around the world on estate planning and administration topics.

Day Pitney Day Pitney was formed in 2007 through the merger of two prominent east coast law firms – Day, Berry & Howard and Pitney Hardin - each with century-long legacies. Today, Day Pitney has approximately 350 attorneys in nine offices throughout Connecticut, Massachusetts, New Jersey, New York and Washington, DC.

IMPORTANT REMINDERS:

1. **Don't forget that we initiated an incentive program to help drum up membership in the underrepresented categories of financial planning, accounting, insurance and allied professions.** If you invite a guest from one of those categories, that guest will be our guest. In other words, they can attend one meeting, free of charge (*advance registration required*). **Space is limited, so we suggest that you reserve a place for yourself and your guest(s) by completing and returning the tear sheet below as soon as possible and no later than Wednesday, October 12th.** Please let us know in advance if you subsequently find that you or your guest is unable to attend.*

2. **As a thank you for supporting our membership program, we will enter each member's name every time he or she attends a meeting with a guest for two round trip American Airlines tickets good for travel in the US 48, Caribbean, Canada or Mexico.** Tickets are compliments of HRG North America. The drawing will be held at our December meeting and you must be present to win!

Finally, please be sure to visit our website at www.epclfc.org for complete details on our 2011-2012 programs!

See you October 19th!

Carolyn Armbrust, AIBA, ASA
Second Vice President, Programs

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

HOW TO REGISTER:

If you are NOT bringing a guest: Please email your RSVP to EPC-LFC@comcast.net or call Lori Somerville at 877-302-6300.

If you ARE bringing a FIRST-TIME guest in one of the following categories: FINANCIAL PLANNING, ACCOUNTING, INSURANCE and ALLIED PROFESSIONS: Please email your guest's name, including the requested information per the guest registration form, along with your RSVP, to EPC-LFC@comcast.net. There is no charge for first-time guests in these categories.*

If you ARE bringing a guest in the ATTORNEY or BANKING categories: Please complete the guest registration form below and send with a check for $50 per guest payable to "EPC/LFC" to: EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

GUEST REGISTRATION FORM

Member name:____ Phone:_______________________

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

Guest name:____**Nickname for Badge:**____________________

Firm:____

Designations: ❒ J.D. ❒ Esq. ❒ CFP ❒ CPA ❒ CLU ❒ ChFC ❒ Other______________________________

Professional Category: ❒ Accounting ❒ Attorney ❒ Banking ❒ Financial Planning ❒ Insurance
❒ (Other) Allied Professional____

Guest name:____**Nickname for Badge:**____________________

Firm:____

Designations: ❒ J.D. ❒ Esq. ❒ CFP ❒ CPA ❒ CLU ❒ ChFC ❒ Other______________________________

Professional Category: ❒ Accounting ❒ Attorney ❒ Banking ❒ Financial Planning ❒ Insurance
❒ (Other) Allied Professional____

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Professional Category: ❒ Accounting ❒ Attorney ❒ Banking ❒ Financial Planning ❒ Insurance
❒ (Other) Allied Professional____

***Effective as of the 12/5/07 dinner program, there is no guest fee for first-time-attendees in the following categories: financial planning, accounting, insurance and allied professions.**