

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

- Topic:** **The 2014 U.S. Trust Study of High Net Worth Philanthropy – A collaboration between U.S. Trust and the Lilly Family School of Philanthropy (a continuation of the 2006, 2008, 2010 and 2012 Bank of America Study of High Net Worth Philanthropy research services)**
- Speaker:** **Joy Hunter Chaillou, Senior Vice President, Philanthropic Specialist, Institutional Investments & Philanthropic Solutions**
- Date & Time:** **Wednesday, October 21, 2015 – 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 **Joy Hunter Chaillou, Senior Vice President, Philanthropic Specialist, Institutional Investments & Philanthropic Solutions**, will be our guest speaker on the subject of **The 2014 U.S. Trust Study of High Net Worth Philanthropy – A collaboration between U.S. Trust and the Lilly Family School of Philanthropy (a continuation of the 2006, 2008, 2010 and 2012 Bank of America Study of High Net Worth Philanthropy research services)** at our October 21st 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.**

On behalf U.S. Trust, our speaker will be presenting the results of the 2014 U.S. Trust Study of High Net Worth Philanthropy. This presentation provides groundbreaking insights into the demographic and psychographic factors driving family philanthropy, volunteerism, and charitable giving among high net worth donors. The fifth in an ongoing examination of high net worth giving, the study’s findings provide a breadth of new data on the philanthropic motivations of wealthy donors, their use of different giving vehicles, and the dynamics of their relationships with the organizations they support. In this challenging economic climate, wealthy donors are not just a critical source of support, but are often a necessity for ensuring the success of a school’s long-term strategic planning, short-term financial well being and, in some cases, survival. Wealthy alumni and other donors have great expectations of the schools and other not-for-profits they support and present unique challenges for academic institutions in both cultivating a real culture of giving to new donors and retaining their current base of support.

Joy Hunter Chaillou is a Senior Vice President, Institutional Philanthropic Specialist. Joy began her career working with nonprofits in 2002. Her areas of focus include: investment management, charitable administration, planned giving and endowment development and nonprofit governance. Joy joined the Institutional Investments & Philanthropic Solutions group in 2010 serving as a consultative resource for qualified nonprofit clients of U.S. Trust and Merrill Lynch. In this role, she worked closely with organizational leadership and boards of directors. By providing tailored services, solutions and best practices to institutional nonprofit clients, she assisted them in capitalizing on opportunities and addressing challenges in support of successful mission fulfillment. Prior to joining Institutional Investments & Philanthropic Solutions, Joy was a partner on an investment management team at Morgan Stanley where she worked with nonprofit organizations to help them increase their organizational capacity. Additionally, Joy spent six years at the American Heart Association serving as the Vice President of Planned Giving and Chair of their National Planned Giving Marketing Committee. Joy earned her B.S. degree from Old Dominion University through the Centre d’Etude Franco-Américain de Management (CEFAM) and her M.B.A. in Strategic Leadership from Dominican University of California. She is a founding Board member of the Association of Fundraising Professionals in Westchester New York where serves as the Membership Chair. Joy is also on the Board of Girl’s Inc. Westchester and the Children’s Support Foundation. She is the Co-Chair for the American Heart Association’s Heart Advisory Committee on Long Island and serves on the Professional Advisory Committees for Central Park Conservancy, Lighthouse International, and the New Jersey Symphony Orchestra. Joy recently co-authored a book titled, *Nonprofit Investment & Development Solutions: A guide to thriving in today’s economy*.

IMPORTANT REMINDERS:

****The deadline to pay your 2015-2016 membership dues is Wednesday, September 30th. If you have not yet received your dues renewal notice in the mail, please contact Lori Somerville to request a duplicate notice. Thank you.**

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.**

Guest Attendees: The guest fee is \$75 and 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 Alan Schachter, 1st Vice President, Membership, at 203-847-4068 or aschachter@citrincooperman.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Wednesday, October 14. 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 more details as they become available on our 2015-2016 program season!

See you October 21st!

Elizabeth A. Cahill
Second Vice President, Programs

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

HOW TO REGISTER:

If you DO NOT require CPA CPE AND are NOT bringing a guest:

Please email your RSVP to EPC-LFC@comcast.net or call Lori Somerville at 877-302-6300.

If you DO require CPA CPE 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 CPA CE

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

Guest name: _____ Nickname for Badge: _____

Firm: _____ Town: _____

Phone: _____ Email: _____

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

MY GUEST REQUIRES CPA CPE

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

Firm: _____ Town: _____

Phone: _____ Email: _____

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

MY GUEST REQUIRES CPA CPE

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

Firm: _____ Town: _____

Phone: _____ Email: _____

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

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