

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

Topic: *Different Flavors of Freezes: A Comparison of GRATs, Sales to Grantor Trusts and Preferred Partnerships"*

Speaker: N. Todd Angkatavanich, Esq., Withers Bergman, LLP

Date & Time: Wednesday, October 25, 2017 – 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 **N. Todd Angkatavanich, Esq., a partner in the private client and tax team at Withers Bergman, LLP**, will be our guest speaker on the subject of *Different Flavors of Freezes: A Comparison of GRATs, Sales to Grantor Trusts and Preferred Partnerships* at our October 25th 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.**

This discussion will provide an overview and comparison of various types of popular "estate freeze" transactions that are implemented by estate planners to provide the due objectives of providing some form of cash flow to the grantor while at the same time shifting future appreciation to the next generation of beneficiaries. There are different "flavors" of freeze transactions each of which have relative pros and cons. This presentation will explore the different aspects of each of these transactions and provide some historical context and practical considerations.

N. Todd Angkatavanich, Esq., is a partner in the private client and tax team at Withers Bergman, LLP. He focuses on tax, trusts and estates, and business succession matters for affluent individuals and their families. Todd regularly advises domestic and international families and family offices with respect to creating trust and related business structures to preserve, protect and grow family wealth for multiple generations in a tax efficient manner. Todd is a frequent speaker on estate planning topics such as Family Limited Partnerships, Business Succession Planning and related Chapter 14 issues. He has given presentations, webinars and teleconferences for various organizations including the Heckerling Estate Planning Institute, the Federal Tax Institute of New England, the ABA Section of Real Property Trust & Estate Law, the Seattle Estate Planning Seminar, Trusts & Estate Magazine, BNA/Tax Management as well as numerous estate planning councils, CPA Societies and professional organizations. He has been rated AV Preeminent® by Martindale-Hubbell® Peer Review Ratings™. Todd has been quoted in articles that have appeared in *Barron's*, *Bloomberg Businessweek*, *The Boston Globe*, *The Philadelphia Inquirer*, *The Chicago Tribune*, *The Miami Herald*, *Forbes*, and *MSN Money*. [Click here](#) for Todd's full profile.

IMPORTANT REMINDERS:

****The deadline to pay your 2017-2018 membership dues is Friday, 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: Effective as of our October 2016 meeting, we will no longer offer any continuing education credits.

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 Thomas J. Henske, at 212-536-6178 or thenske@lenoxadvisors.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Wednesday, October 18th. 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 2017-2018 program season!

See you October 25th!

Christopher C. Vescio, CPA
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 guest: If you are bringing guest(s), the registration fee is \$75 per guest.

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:** _____

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 _____

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

Firm: _____ Town: _____

Phone: _____ Email: _____

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

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

Firm: _____ Town: _____

Phone: _____ Email: _____

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

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