

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

**Topic:** Proposed Regulations Under Section 2704: The End of Family Discounts?  
**Speaker:** Steven Lavner, Managing Director, National Wealth Planning Strategies Group, U.S. Trust, Bank of America Private Wealth Management  
**Date & Time:** Wednesday, October 26, 2016 – 5:45 p.m. – 8:30 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 Lavner, Managing Director, National Wealth Planning Strategies Group, U.S. Trust, Bank of America Private Wealth Management**, will be our guest speaker on the subject of the **Proposed Regulations Under Section 2704: The End of Family Discounts?** at our October 26th evening program at **Giovanni's II** in Darien.

In response to member feedback that we've been actively soliciting this past year, we are making a few changes to our program format as of our October meeting. In particular, we learned that our members wanted (1) more networking time and (2) shorter educational presentations. Therefore, please note the following changes to our program format:

5:45-6:15	Registration w/open bar
6:15-6:45	Educational Presentation (no CEs)
6:45-8:30	Networking w/open bar and substantial passed hors d'oeuvres (no sit-down dinner)

Mr. Lavner will address the long-awaited proposed regulations under Section 2704 have been issued. The regulations may limit or possibly eliminate valuation discounts for family-controlled entities. But there is significant disagreement as to the proper interpretation of the regulations. The regulations are generally not effective until finalized. This presentation will include a discussion of the proposed regulations and their impact on planning.

**Steven Lavner** is a Managing Director in the National Wealth Strategies Group of U.S. Trust, Bank of America Private Wealth Management, where he works with clients on all aspects of estate planning. Prior to joining U.S. Trust in 1998, he was Counsel to the New York City law firm of Kaye Scholer LLP beginning in 1980, where he specialized in trusts and estates law. He is a frequent speaker on issues relating to estate planning and taxation. Mr. Lavner earned his B.A. from New York University in 1977, graduating magna cum laude. In 1980, he received his J.D. from the New York University School of Law, where he was a journal member of the Annual Survey of American Law. In 1981, he was admitted to the New York Bar.

**IMPORTANT REMINDERS:**

**\*\*The deadline to pay your 2016-2017 membership dues was Friday, September 30<sup>th</sup>. 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](http://www.epclfc.org)). Questions regarding membership or the application process can be addressed by Elizabeth A. Cahill, 1st Vice President, Membership, at 203-422-5206 or [elizabeth.a.cahill@ustrust.com](mailto:elizabeth.a.cahill@ustrust.com).

**Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Wednesday, October 19th.** 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](http://www.epclfc.org) for more details as they become available on our 2016-2017 program season!

See you October 26th!

Thomas J. Henske  
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](mailto: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.

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## 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 \_\_\_\_\_

Guest name: \_\_\_\_\_ Nickname for Badge: \_\_\_\_\_

Firm: \_\_\_\_\_ Town: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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