

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

**Topic:** *A Discussion of Estate Planning Ideas for Year-End 2020 in Light of the Potential “Blue Wave”*

**Speaker:** Gregory A. Saum, J.D., Law Office of Gregory A. Saum, LLC

**Date:** Wednesday October 27, 2020

**Time:** 4:00 p.m. - 5:00 p.m.

**Place:** Via Zoom

Dear Council Member:

We are pleased to announce that we will be hosting a special session on *Estate Planning Ideas for Year-End 2020 in Light of the Potential “Blue Wave”* on Tuesday, October 27<sup>th</sup>, with **Gregory A. Saum, J.D., Law Office of Gregory A. Saum, LLC**. The event will run from 4:00 p.m. to 5:00 p.m. and may include breakout sessions during which members will be broken out into smaller groups to discuss planning techniques, what we are each doing, and challenges and pitfalls that we may be experiencing. Attorney Saum is a former partner of Ivey, Barnum & O’Mara and Cummings & Lockwood and a past President of the Estate Planning Council of Lower Fairfield County. [Click here](#) for speaker bio.

**Guest Attendees:**

Due to the fact that we’ve had to move to all virtual programming, guests are welcome to attend our webinars at no charge. However, our guest policy remains essentially the same: guest attendance by a professional colleague is limited to two *virtual* events 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 Robin Sherwood, CFP®, our First Vice President, Membership, at 203-972-8262 or [robin@htgadvisors.com](mailto:robin@htgadvisors.com).*

Please see below for registration details for members and guests. Note, registration deadline is Monday, October 26<sup>th</sup>.

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 2020-2021 program season!

We hope you will join us on October 27th!

Alva J. Carter-Hasan  
Second Vice President, Programs

**IMPORTANT REMINDER:**

The deadline to pay your 2020-2021 membership dues was September 30<sup>th</sup>. If you have not yet received your dues renewal notice via email, please contact our Council Administrator Lori Somerville at 877-302-6300 or [epc-lfc@comcast.net](mailto:epc-lfc@comcast.net) to request a duplicate notice. Thank you.

**If you are NOT bringing a guest:** Please register via reply email to [EPC-LFC@comcast.net](mailto:EPC-LFC@comcast.net) or call Lori Somerville at 877-302-6300. You will receive a confirmation email with instructions to join the meeting a day in advance.

**If you ARE bringing a guest:** Please register your guest by completing and emailing the registration form below, or providing the requested information within the body of an email to [EPC-LFC@comcast.net](mailto:EPC-LFC@comcast.net), or calling Lori Somerville at 877-302-6300.

**IMPORTANT:** Emails must be provided in order for guests to receive the confirmation email with instructions to join the meeting a day in advance.

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**REGISTRATION FORM**

**Member name:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Guest name:** \_\_\_\_\_

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

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

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

**Guest name:** \_\_\_\_\_

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

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

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

**Guest name:** \_\_\_\_\_

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

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

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

**Guest name:** \_\_\_\_\_

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

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

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