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

Topic:	***Private Foundations – A Universe of Options***
Speaker:	**Joseph P. Toce, Jr., JD, CPA, Office Managing Director, WTAS, New York**
Date & Time:	**Wednesday, October 28, 2009 – 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 **Joseph P. Toce, Jr., JD, CPA, Office Managing Director, WTAS, New York,** will be our guest speaker on the subject of ***Private Foundations – A Universe of Options*** at the **first meeting of our 2009-2010 Program Season**. **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.**

Attorney Toce's presentation will include an introduction to Private Foundations and cover tax considerations, operating rules, funding vehicles, the various options available, and types of property contributed. Ample time will be provided for Q&A.

Joe Toce has over 31 years of experience in advising clients on a broad range of tax, financial and business matters affecting closely held businesses including private equity, operating companies, real estate and service companies. He has represented three of the 20 largest family companies in the U.S. on tax and estate planning matters. He also has substantial experience with charitable giving. Joe specializes in integrated tax planning for high net worth individuals and families. His extensive experience enables him to anticipate and plan for minimizing income, estate and gift taxes for individuals, trusts and corporations. His client base includes several of the largest S corporations in the country, numerous multinational families and many large charitable foundations. Joe serves as Office Managing Director of the WTAS' New York office. Before joining WTAS, Joe was a Tax Partner in an international professional services firm where he headed the Private Client Services Practice in New York. Joe is a co-author of the treatise *Tax Economics of Charitable Giving*. He is a frequent speaker on individual tax matters to groups such as the Connecticut Bar Association, the Connecticut Bankers Association, as well as CNBC, the *Wall Street Journal* and other media. Joe received his BA (Government) from Georgetown University and is a member of the American Institute of CPAs, New York Society of CPAs, Connecticut Society of CPAs, and the Connecticut State Bar.

IMPORTANT REMINDER: **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 Friday, October 23.** Please let us know in advance if you subsequently find that you or your guest are unable to attend.*

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2009-2010 program season!

See you October 28th!

James H. Dean, CLU, ChFC
Second Vice President, Programs

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

If you will attend, please detach and mail to: EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

Note: If you are not bringing a guest to this meeting or if you are bringing a free first-time attendee guest (*see applicable categories below), please feel free to email your registration (including guest name(s), if any) to Lori at EPC-LFC@comcast.net. Or call her at 877-302-6300.

_____ I will attend the meeting on October 28, 2009.

Member name:____ Phone:___________________________

*I will bring the following guests **(if attorney or banking categories, please enclose a $50 check per guest made payable to "EPC/LFC"):**

Guest name:____

Guest name:____

Guest name:____

Guest name:____

______ attorney and/or banking guest(s) x $50 = Total amount enclosed:______________

***Effective as of our December 2007 dinner program, there is no guest fee for first-time attendees in the following categories: financial planning, accounting, insurance and allied professions.**