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

Topic:	**Alternative Investments… an Investor's Perspective**
Speaker:	**Mitchell A. Drossman, J.D., CPA, National Director of Wealth Planning Strategies and Managing Director, U.S. Trust, Bank of America Private Wealth Management**
Date & Time:	**Wednesday, December 10, 2007 - 5:45 p.m. - 8:45 p.m.**
Place:	**Innis Arden Golf Club, 120 Tomac Avenue, Old Greenwich, CT**

Dear Council Member:

We are pleased to announce that **Mitchell A. Drossman, J.D., CPA, National Director of Wealth Planning Strategies and Managing Director, U.S. Trust, Bank of America Private Wealth Management,** will be the guest speaker at our December 10th dinner meeting at Innis Arden Golf Club. Mr. Drossman will talk about Alternative Investments, from an investor's perspective, including trusts as qualified purchasers and related securities laws.

Registration and cocktail reception ***(everyone will receive two free drink tickets!)*** **will begin at 5:45 p.m., followed by dinner promptly at 6:30 p.m., speakers at 7:30 p.m., and we anticipate an end to the meeting between 8:30 p.m. and 8:45 p.m.** For directions, visit www.innisardengolfclub.com

Mitchell A. Drossman specializes in sophisticated tax, estate and financial planning at U.S. Trust, Bank of American Private Wealth Management. Prior to U. S. Trust, Mitch was at Proskauer & Rose where he practiced exclusively in Trusts & Estates. Mr. Drossman is also a Certified Public Accountant and was previously with Ernst & Young, LLP. He is co-author of a chapter on fiduciary tax responsibilities in J.K. Lasser's *Estate Tax Techniques* published by Matthew Bender & Company and serves on the Advisory Board of *Practical Drafting*, a highly regarded estate planning publication. Mr. Drossman has spoken at numerous conferences, including ACTEC Annual Meeting, New York State Society of CPA's Annual Estate Planning Conference, UJA-Federation Annual Estate Tax and Financial Planning Conference as well as various bar association and estate planning council meetings. Mitch is a member of the Association of the Bar of the City of New York (and its Committee on Estate and Gift Taxation, 1996-2000), the New York State Bar Association (and its Trusts and Estates Section and Estate Planning Committee), the New York State Society of CPAs (and served as the Chair of the Committee on Income Taxation of Estates and Trusts), the UJA-Federation's Trusts and Estates Specialty Group (and currently serves as it Vice-Chair) and the Alumni Admissions Board of Brooklyn Law School. Mr. Drossman received his J.D. cum laude from Brooklyn Law School where he served as Editor of the Law Review.

IMPORTANT: Don't forget that we have 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, effective as of our December program, 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 Wednesday, December 3.** Please let us know in advance if you (or your guest) subsequently find that you 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 2008-2009 program season!

See you December 10th!

Mary Wall, CFP®, CPA, CTFA
Second Vice President, Programs

***To cancel, please call Lori Somerville at 877-302-6300 no later than Wednesday, December 3rd.**

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

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 e-mail your registration form (including guest name(s) and other requested info) to Lori at EPC-LFC@comcast.net or call her at 877-302-6300.

_____ I will attend the meeting on December 10, 2008.

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"):**

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

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

Guest name:____

Firm:____

Designations: ❒ J.D. ❒ Esq. ❒ CFP ❒ CPA ❒ CLU ❒ ChFC ❒ Other_____________________________

Professional Category: ❒ Accounting ❒ Attorney ❒ Banking ❒ Financial Planning ❒ Insurance
❒ (Other) Allied Professional____

Guest name:____

Firm:____

Designations: ❒ J.D. ❒ Esq. ❒ CFP ❒ CPA ❒ CLU ❒ ChFC ❒ Other_____________________________

Professional Category: ❒ Accounting ❒ Attorney ❒ Banking ❒ Financial Planning ❒ Insurance
❒ (Other) Allied Professional____

Guest name:____

Firm:____

Designations: ❒ J.D. ❒ Esq. ❒ CFP ❒ CPA ❒ CLU ❒ ChFC ❒ Other_____________________________

Professional Category: ❒ Accounting ❒ Attorney ❒ Banking ❒ Financial Planning ❒ Insurance
❒ (Other) Allied Professional____

Guest name:____

Firm:____

Designations: ❒ J.D. ❒ Esq. ❒ CFP ❒ CPA ❒ CLU ❒ ChFC ❒ Other_____________________________

Professional Category: ❒ Accounting ❒ Attorney ❒ Banking ❒ Financial Planning ❒ Insurance
❒ (Other) Allied Professional____

***Effective as of the 12/5/07 dinner program, there is no guest fee for first-time-attendees in the following categories: financial planning, accounting, insurance and allied professions.**