

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

Topic: *“When Breaking Up is NOT Hard to Do”*

Speaker: **Julie Min Chayet, Managing Director, Private Client Advisor,
Bank of America Private Bank**

Date & Time: **Wednesday, December 11, 2019 – 5:45 p.m. – 8:00 p.m.**

Place: **Innis Arden Golf Club, 120 Tomac Avenue, Old Greenwich, CT**

Dear Council Member:

We are pleased to announce that **Julie Min Chayet, Managing Director, Private Client Advisor, Bank of America Private Bank**, will be our guest speaker at our December 11th dinner meeting at **Innis Arden Golf Club** in Old Greenwich. Cash bar and cocktails will begin at 5:45 p.m., followed by dinner promptly at 6:30 p.m. and the speaker presentation from 7:15 p.m.-8:00 p.m.

This presentation will address trustee breakups and resignations and how to incorporate best practices for determining when the relationship needs to end. Our presenter, Julie Min Chayet, is a Managing Director and Private Client Advisor with Bank of America Private Bank in Westport, Connecticut. Julie collaborates with a client’s broader Bank of America team and external advisors to oversee investment, trust, philanthropy, credit and lending services. Julie joined the firm in 2014. Prior to her current role, she served as a Market Trust Executive for four years, leading a team of Trust Officers in Connecticut, upstate New York and Long Island. Her experience includes ten years with Fiduciary Trust Company International, where she served as a Business Development Officer and Trust Counsel. [Click here](#) for speaker bio.

IMPORTANT REMINDERS:

****The deadline to pay your 2019-2020 membership dues was September 30th. If you have not yet received your dues renewal notice in the mail, please contact Council Administrator Lori Somerville at 877-302-6300 or epc-lfc@comcast.net to request a duplicate notice. Thank you.**

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 Jennifer M. Pagnillo, our First Vice President, Membership, at 203-862-7875 or jmpagnillo@daypitney.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Wednesday, December 4th. Please let us know if you and/or your guest intend to stay for the cocktail hour only so that we do not include you in the headcount that we must provide the meeting venue and let us know in advance if plans change and 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 2019-2020 program season!

See you December 11th!

Alva J. Carter-Hasan
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: _____

Phone: _____ Email: _____

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

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

Firm: _____

Phone: _____ Email: _____

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

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

Firm: _____

Phone: _____ Email: _____

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

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

Firm: _____

Phone: _____ Email: _____

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