

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

Topic: Drafting and Administering Discretionary Trusts & Post-Election Tax Law Changes

Speaker: Susan Porter, Esq., Senior Advisor, Brown Brothers Harriman Trust Company, NA

Date & Time: Wednesday, December 5, 2012 – 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 **Susan Porter, Esq., a Senior Advisor with Brown Brothers Harriman Trust Company, NA**, will be our guest speaker on the subjects of *Drafting and Administering Discretionary Trusts & Post-Election Tax Law Changes* at our December 5th 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., speaker 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.

Attorney Porter will discuss the issues to consider in drafting and administering discretionary trusts. She will also talk about the potential changes in the tax laws following the 2012 elections.

Susan Porter is a Senior Advisor at Brown Brothers Harriman Trust Company, NA, having joined in 2011. She has extensive experience in the trust banking industry, lecturing about estate and trust administration and consulting with clients and their advisors on complex tax, estate, fiduciary and charitable planning issues. Susan is an active member of several bar organizations, including the ABA Real Property Trust and Estate Section and the Advisory Committee of the Heckerling Institute on Estate Planning. In addition to her professional interests, she serves on several not-for-profit boards, including People's Symphony Concerts and The Metropolitan Museum of Art Professional Advisory Council. Susan received her AB from Vassar College, her JD from the University of Wisconsin Law School and her LLM from New York University Law School. She is a Certified Trust and Financial Advisor (CTFA) and an Accredited Estate Planner (Distinguished)®.

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, November 28th. 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 for complete details as they become available on next year's programs.

See you December 5th!

Matthew A. Bovino
Second Vice President, Programs

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

See registration form next page.

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: Please complete the guest registration form below and mail it with a check for \$50 per guest payable to "EPC/LFC" to: EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

GUEST REGISTRATION FORM

Member name: _____ Phone: _____

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

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 _____

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