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

Topic: *International Aspects of Estate Planning*

Speakers: **N. Todd Angkatavanich, J.D., LL.M., & Edward A. Renn, J.D., Withers Bergman**

Date & Time: **Wednesday, December 9, 2009 – 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 **N. Todd Angkatavanich, J.D., LL.M., and Edward A. Renn, J.D., of Withers Bergman,** will be our guest speakers on the subject of ***International Aspects of Estate Planning*** at our December 9th Dinner Meeting at Innis Arden Golf Club. **Cash bar and cocktails will begin at 5:45 p.m., followed by dinner promptly at 6:30 p.m., speaker at 7:15 p.m., and we anticipate an end to the meeting at 8:45 p.m.** For directions, visit www.innisardengolfclub.com.

This 90-minute presentation will provide a broad overview of Estate, Gift and Income Tax issues and pitfalls as they relate to the international aspects of estate planning.

N. Todd Angkatavanich, a principal of Withers Bergman, joined the firm as Of Counsel in 2005 and specializes in taxation, trusts and estates, wealth transfer planning for hedge fund and private equity fund principals, family limited partnerships, and business succession matters with emphasis on Chapter 14 issues. He has co-authored numerous articles, including “Section 2703-Keeping Buy/Sell Agreements Intact for Estate Planning and Succession Planning of Family Owned Businesses,” *Insights Magazine*, Autumn 2007; “Beneficiary Withdrawal Powers in Grantor Trusts-A Crumm(e)y Idea?” *Estate Planning*, October 2007; “Nothing Succeeds Like Succession,” *Private Wealth*, June/July 2007 (co-authored with Frank W. Seneco); and “Sabotaged: Don’t let a buy-sell agreement blow up an estate plan,” *Trusts & Estates Magazine*, April 2006 (co-authored with Edward A. Renn). He is a member of the New York and New Jersey Bar Assocations and is admitted to the Connecticut, New York and New Jersey Bar and he is a Registered Foreign Lawyer in the United Kingdom. He received his B.A., 1989, Fairleigh Dickinson University, Economics, *magna cum laude,* J.D., 1993, Rutgers Graduate School of Management, M.B.A., 1993, and New York University School of Law, Taxation, LL.M., 1999.

Edward A. Renn, J.D., is Partner with Withers Bergman, New Haven, CT. Ed focuses on domestic and international private client matters. He provides legal advice on US and international estate planning, income maximization strategies, FLP and LLC planning, wealth preservation, business succession planning, international tax planning for entities and individuals, trust structures and estate administration. A significant part of his practice focuses on domestic and international estate planning for hedge fund and private equity principals. Ed is a frequent speaker and has co-authored several books on estate planning for individuals. Ed is admitted to practice in the United States Tax Court. He received his B.A. from Syracuse University and graduated University of Connecticut School of Law with high honors, J.D.; He is admitted to State of CT, 1988; Registered Foreign Lawyer in the UK, 2002; State of NY, 2004; Washington D.C., 2003; Commonwealth of MA, 2007. Ed is a member of the Connecticut Bar Association, American Bar Association, New York Bar Association, District of Columbia Bar Association, Society of Trust and Estate Practitioners (STEP), and the Financial Planning Association.

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 Wednesday, December 2.** 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 December 9th!

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 December 9, 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"):**

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.**