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

Topic: ***Asset Protection: Keeping It All In The Family***

Speakers: **Gideon Rothschild, JD, Partner, Moses Singer LLP, New York, NY**

Date & Time: **Wednesday, February 10, 2010 – 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 **Gideon Rothschild, JD, Partner, Moses Singer LLP,** will be our guest speaker on the subject of ***Asset Protection: Keeping It All In The Family*** at our February 10th Dinner Meeting at Giovanni's II in Darien. **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.**

No longer is asset protection limited to offshore strategies. Eleven states have now enacted legislation providing for creditor protection of self-settled trusts. This presentation will discuss domestic and foreign developments, when to use domestic vs. foreign trusts, challenges against foreign trusts; how to promote the use of discretionary trusts by learning the tools of flexible drafting; and a review of the Bankruptcy Reform Act of 2005 and its effect on asset protection trusts, IRAs and homestead exemptions.

Gideon Rothschild focuses his practice in the areas of domestic and international estate planning and asset protection, including the use of sophisticated estate planning techniques in the representation of high-net-worth individuals. Mr. Rothschild is a nationally-recognized authority on the use of offshore trusts and estate planning strategies for wealth preservation and succession planning. His clients include professionals, real estate developers and owners, closely-held business owners and directors of publicly-held companies. His practice also includes estate administration and the representation of clients in taxpayer disputes at the federal, state and local levels. Mr. Rothschild distinguishes himself from many of his peers in that his estate planning recommendations are integrated with asset protection objectives. That is, by educating his clients on the non-tax benefits available with trusts and other vehicles and how they can be drafted in a flexible manner, his clients can achieve both tax savings and wealth preservation. Such benefits include protection from divorce, creditors or litigation exposure.

Mr. Rothschild is the recipient of several honors and awards, including: "Top 40 Tax Advisors," *CPA Magazine;* "America's Leading Lawyers for Wealth Management," *Chambers USA*; "Top 100 Attorneys" serving private clients, *Worth/Robb Report*; "Distinguished Accredited Estate Planner" award, National Association of Estate Planners & Councils; *Citywealth Leaders List; The Best Lawyers in America®, American Lawyer; The Best Lawyers in New York®, American Lawyer*; "New York Super Lawyers," *Law & Politics*; and 2008 Honoree, UJA-Federation of New York, Trusts & Estates Group of The Lawyers Division.

Mr. Rothschild is also the co-author of *BNA Tax Management Portfolio* on "Asset Protection Planning" and is a member of the Advisory Boards of *BNA Tax Management* and *Trusts & Estates* magazine. He is an Adjunct Professor at the University of Miami School of Law Graduate Program and lectures frequently on asset protection and advanced estate planning strategies to professional groups. Mr. Rothschild is also licensed as a Certified Public Accountant.

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, February 5.** 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 February 10th!

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 February 10, 2010.

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.**