

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

**Topic:** *Qualified Opportunity Zone Funds*

**Speaker:** Michael Jordan, CPA, Managing Director, & Joe Gill, CPA, Managing Director, Andersen

**Date:** Wednesday February 10, 2021

**Time:** 5:30pm-5:45pm: Networking  
5:45pm-6:30pm: Presentation

**Place:** Via Zoom

Dear Council Member:

We are pleased to announce that **Michael Jordan, CPA, Managing Director, & Joe Gill, CPA, Managing Director, Andersen**, will be our guest speaker on the topic of “*Qualified Opportunity Zone Funds*” for our February 10<sup>th</sup> webinar via Zoom. The program will begin with networking from 5:30pm to 5:45pm, followed by the presentation from 5:45pm to 6:30pm.

Qualified Opportunity Zones (QOZs) were added to the tax code by the Tax Cuts and Jobs Act on December 22, 2017, as an economic development tool designed to spur economic development and job creation in distressed communities. Our presenters will talk about the use of Qualified Opportunity Funds (QOF) as an investment vehicle that files either a partnership or corporate federal income tax return and is organized for the purpose of investing in QOZ property. [Click here](#) for speaker bios.

**Guest Attendees:**

Due to the fact that we've had to move to all virtual programming, guests are welcome to attend our webinars at no charge. However, our guest policy remains essentially the same: guest attendance by a professional colleague is limited to two *virtual* events 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](http://www.epclfc.org)).* Questions regarding membership or the application process can be addressed by Robin Sherwood, CFP®, our First Vice President, Membership, at 203.972.8262 or [robin@htgadvisors.com](mailto:robin@htgadvisors.com).

Please see below for registration details for members and guests. Note, registration deadline is Monday, February 8<sup>th</sup>.

Finally, please be sure to visit our website at [www.epclfc.org](http://www.epclfc.org) for more details as they become available on our 2020-2021 program season!

We hope you will join us on February 10<sup>th</sup>!

Alva J. Carter-Hasan  
Second Vice President, Programs

**IMPORTANT REMINDER:**

The deadline to pay your 2020-2021 membership dues was September 30<sup>th</sup>. If you have not yet received your dues renewal notice via email, please contact our Council Administrator Lori Somerville at 877-302-6300 or [epc-lfc@comcast.net](mailto:epc-lfc@comcast.net) to request a duplicate notice. Thank you.

**If you are NOT bringing a guest:** Please register via reply email to [EPC-LFC@comcast.net](mailto:EPC-LFC@comcast.net) or call Lori Somerville at 877-302-6300. You will receive a confirmation email with instructions to join the meeting a day in advance.

**If you ARE bringing a guest:** Please register your guest by completing and emailing the registration form below, or providing the requested information within the body of an email to [EPC-LFC@comcast.net](mailto:EPC-LFC@comcast.net), or calling Lori Somerville at 877-302-6300.

**IMPORTANT:** Emails must be provided in order for guests to receive the confirmation email with instructions to join the meeting a day in advance.

**2/10/21 REGISTRATION FORM**

**Member name:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Guest name:** \_\_\_\_\_

Firm: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

**Guest name:** \_\_\_\_\_

Firm: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

**Guest name:** \_\_\_\_\_

Firm: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

**Guest name:** \_\_\_\_\_

Firm: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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