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

Topic: ***The Most Common Issues Planners Encounter When Reviewing Wills and Trusts***

Speaker: **Lisa Bianculli Hutter, JD, LLM, Senior Vice President, Regional Wealth Planning Manager (Northeast Region), Wells Fargo Private Bank**

Date & Time: **Wednesday, February 12, 2014 – 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 **Lisa Bianculli Hutter, JD, LLM, Senior Vice President, Regional Wealth Planning Manager (Northeast Region), Wells Fargo Private Bank,** will be our guest speaker on the subject of ***The Most Common Issues Planners Encounter When Reviewing Wills and Trusts*** at our February 12th 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.**

This one hour presentation will address the most common issues planners encounter when reviewing wills and estates: Fiduciary Issues (trustee appointments, functional offices), Tax Specific Issues (grantor trusts, income, estate and generation skipping transfer tax), Special Assets (artwork, life insurance), and Administration Issues (flexibility, construction and interpretation, tangible distributions). Presentation will also include a comprehensive case study based on a true story of the estate and Last Will and Testament of a well-known public figure. The case study will review in-depth the issues with the Last Will and Testament and provide potential solutions to resolve these issues.

Lisa Bianculli Hutter is Regional Wealth Planning Manager and a Senior Financial Planner for the Northeast Region of the Wells Fargo Private Bank, servicing New Jersey, Connecticut and New York clientele. She has over 16 years of experience in financial, tax, business and estate planning. In addition to managing a team of wealth planners, Lisa provides comprehensive wealth planning to clientele of the Private Bank that is customized to meet their specific needs based on their individual goals and objectives. During her tenure, Lisa has focused on wealth transfer planning for closely held and family business owners, senior corporate executives, non-traditional families and foreign citizens. She also has extensive experience in the charitable giving area, working with families to establish and monitor their private foundations and supporting a well-known donor advised fund. As part of her responsibilities at various Trust companies, she handled resolution of complex estate and trust administration issues. She has also conducted seminars in various areas of wealth planning and has had multiple articles published in academic and trade journals. Click here to read Lisa's full bio.

IMPORTANT REMINDERS:

Continuing Education Credits: We will be offering CEUs, at $40 per credit hour, for our CPA and CFP® designated members attending our breakfast and dinner meetings as well as for CPA and CFP® designated guests attending our dinner meetings. **Requests for CEUs should be indicated on the individual program announcement registration form at the bottom of this page and the CE fee must be paid in advance by check. CFP CE UPDATE: This presentation has been accepted for one (1) hour of continuing education credit by CFP Board of Standards.** We will be submitting the course attendance roster online after the meeting. We will also provide Certificates of Attendance to those attendees requiring CPA CEs for their self-reporting purposes.

Guest Attendees: Effective as of our October program, the guest fee is $75. In addition, effective as of our May 2013 program, 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 Matt Bovino, 1st Vice President, Membership, at 203-966-8759 or MABovino@DavidsonDawson.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Wednesday, February 5th. 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 our upcoming breakfast meetings and dinner programs.

See you February 12th!

Alessandra DiMauro
Second Vice President, Programs

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

HOW TO REGISTER:

If you DO NOT require CE AND are NOT bringing a guest:
Please email your RSVP to EPC-LFC@comcast.net or call Lori Somerville at 877-302-600.

If you DO require CE AND/OR if you ARE bringing a guest:
If you require CE, the fee is $40.
If you are bringing guest(s), the registration fee is $75 per guest or, if they require CE, $115 per guest.
All CE fees must be paid in advance.

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:**____________________

❒ I REQUIRE CFP CE: CFP Certificant #________________ and/or last 4 digits of SSN#:____________________
❒ I REQUIRE CPA CE

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________________________

❒ MY GUEST REQUIRES CFP CE: CFP Certificant #________________ and/or last 4 digits of SSN#_______
❒ MY GUEST REQUIRES CPA CE

Guest name:____**Nickname for Badge:**____________________

Firm:____

Phone:________________________________Email:________________________________

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