

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

Topic: *Post-Mortem Planning and Administration – What Every Executor (and Their Advisors) Should Know*

Speakers: Gerard F. Joyce, Managing Director, Deputy General Trust Counsel and National Head of Trusts & Estates, Kevin J. Duncan, Managing Director, Director of Estate Administration and Trust Counsel, Brian D. Conboy, Vice President, Senior Estate Settlement Officer, Fiduciary Trust Company International

Date & Time: Wednesday, February 20, 2019 – 5:45 p.m. – 8:30 p.m.

Place: The J House, 1114 East Putnam Avenue, Greenwich, CT

Dear Council Member:

We are pleased to announce that our three guest speakers from **Fiduciary Trust Company International, Gerard F. Joyce, Kevin J. Duncan, and Brian D. Conboy**, will present on the topic of *Post-Mortem Planning and Administration – What Every Executor (and Their Advisors) Should Know* at our February 20th dinner meeting at **The J House** in Greenwich. Cash bar and cocktails will begin at 5:45 p.m. with passed hors d'oeuvres and buffet station, followed by the speakers at 7:30 p.m., and we anticipate an end to the meeting between 8:30 p.m. and 8:45 p.m.

Join us as our presenters discuss the roles and responsibilities of serving as executor. They will talk about the practical problems executors often encounter and offer insightful tips and tools for addressing these common issues. Among the topics covered will be investment considerations and cash needs, collecting, valuing and insuring unique assets, tax filings and distribution timings. Also discussed will be the common tax elections that all executors must consider during administration and the presentation will end with an overview of the most common audit triggers. [Click here](#) for speaker bios.

Guest Attendees: The guest fee is \$75 and 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 Christopher C. Vescio, at 914-358-9888 or Christopher@VescioCPA.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Wednesday, February 13th. 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 more details as they become available on our 2018-2019 program season!

See you February 20th!

Jennifer M. Pagnillo, J.D.
Second Vice President, Programs

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

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: If you are bringing guest(s), the registration fee is \$75 per guest.

Please complete the registration form below and mail it with your check payable to "EPC/LFC" to:

REGISTRATION FORM

Member name: _____ **Phone:** _____

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

Guest name: _____ **Nickname for Badge:** _____

Firm: _____ Town: _____

Phone: _____ Email: _____

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

Guest name: _____ **Nickname for Badge:** _____

Firm: _____ Town: _____

Phone: _____ Email: _____

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

Guest name: _____ **Nickname for Badge:** _____

Firm: _____ Town: _____

Phone: _____ Email: _____

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

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