

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

Topic: Charitable Giving Panel Discussion

Moderator: Margot Navins, CAP®, Vice President/Charitable Planning Consultant, Fidelity Charitable

Panelists: Ryan A. Boland, Vice President, Complex Asset Group, Fidelity Charitable
Lauren Patterson, President/CEO, New Canaan Community Foundation

Date & Time: Wednesday, February 21, 2018 – 5:45 p.m. – 8:30 p.m.

Place: Giovanni's II (The Waters Edge), 2748 Post Road, Darien, CT

Dear Council Member:

We are pleased to announce that **Margot Navins, CAP®, Vice President/Charitable Planning Consultant, Fidelity Charitable, Ryan A. Boland, Vice President, Complex Asset Group, Fidelity Charitable, and Lauren Patterson, President/CEO, New Canaan Community Foundation**, will be our guest speakers on the subject of “*Charitable Giving*” at our February 21st dinner meeting at **Giovanni's II (The Waters Edge)** 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. [Click here](#) for moderator-panelist bios.

IMPORTANT REMINDERS:

The deadline to pay your 2017-2018 membership dues was Friday, September 30th. If you have not yet received your dues renewal notice in the mail, please contact Lori Somerville at 877-302-6300 or EPC-LFC@comcast.net to request a duplicate notice. Thank you.

Continuing Education Credits: Effective as of our October 2016 meeting, we will no longer offer any continuing education credits.

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 Thomas J. Henske, at 212-536-6178 or thenske@lenoxadvisors.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Wednesday, February 14th. 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 2017-2018 program season!

See you February 21st

Christopher C. Vescio, CPA
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:
EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

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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