

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

Topic: *“Preserving Family Assets & Relationships: Addressing Addiction & Other Behavioral Health Issues”*

Speaker: Whitney Johnson & Jonathan Green, Ph.D., O’Connor Professional Group

Date & Time: Wednesday, February 26, 2020 – 5:45 p.m. – 8:00 p.m.

Place: Country Club of Darien, 300 Mansfield Avenue, Darien, CT 06820

Dear Council Member:

We are pleased to announce that **Whitney Johnson & Jonathan Green with O’Connor Professional Group** will be our guest speakers on the topic of *“Preserving Family Assets & Relationships: Addressing Addiction & Other Behavioral Health Issues”* at our February 26th dinner meeting at **The Country Club of Darien**. Cash bar and cocktails will begin at 5:45 p.m., followed by dinner promptly at 6:30 p.m. and the speaker presentation from 7:15 p.m.-8:00 p.m.

Addiction and other behavioral health issues are often referred to as “family diseases,” meaning that one individual’s diagnoses and consequent behaviors have emotional impacts on an entire family system. The assets shared within wealthy families (ex. businesses, investments) add a layer of complexity to an already confusing and crisis-driven situation. High net worth families are not only attempting to access appropriate clinical treatment for loved ones, but they are also tasked with determining how to protect their assets. Through several case studies, this presentation will address how to balance the clinical needs of the individual with the business needs of the family and what roles advisors can play to help families preserve wealth for future generations. The presentation will also review how advisors can raise concerns, the risks of speaking up versus staying quiet, what state of the art treatment looks like and how families can achieve long term recovery. [Click here](#) for speaker bios.

IMPORTANT REMINDERS:

****The deadline to pay your 2019-2020 membership dues was September 30th. If you have not yet received your dues renewal notice in the mail, please contact Council Administrator Lori Somerville at 877-302-6300 or epc-lfc@comcast.net to request a duplicate notice. Thank you.**

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 Jennifer M. Pagnillo, our First Vice President, Membership, at 203-862-7875 or jmpagnillo@daypitney.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Wednesday, February 19. Please let us know if you and/or your guest intend to stay for the cocktail hour only so that we do not include you in the headcount that we must provide the meeting venue and let us know in advance if plans change and 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 2019-2020 program season!

See you February 26th!

Alva J. Carter-Hasan
Second Vice President, Programs



This dinner program is proudly sponsored by Vescio Family Advisors, LLC. Accountants and Advisors.

**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: _____

Phone: _____ Email: _____

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

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

Firm: _____

Phone: _____ Email: _____

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

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

Firm: _____

Phone: _____ Email: _____

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

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

Firm: _____

Phone: _____ Email: _____

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