

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

Topic: Naming Trusts as Beneficiaries of Retirement Plans

Speaker: Douglas H. Olin, J.D., LL.M., Cummings & Lockwood, Private Clients Group

Date & Time: Wednesday, February 4, 2009, 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 **Douglas H. Olin, J.D., LL.M., Cummings & Lockwood, Private Clients Group**, will be the guest speaker at **our first dinner program of the New Year on Wednesday, February 4**, at Giovanni's II in Darien. Doug's presentation will focus on *Naming Trusts as Beneficiaries of Retirement Plans*. **Registration and cash bar 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.**

Douglas H. Olin is a principal in Cummings & Lockwood's Private Clients Group. His practice focuses on estate planning, family business succession planning, and estate and trust administration. Doug speaks frequently on estate and tax planning topics to both lawyer and non-lawyer audiences. He received his B.B.A. in accounting, with distinction, in May 1990 from Emory University in Atlanta, Georgia. He attended New York University School of Law, where he received his J.D. in 1993 and his LL.M. in Taxation in 1995. Doug is admitted to practice in Connecticut and New York and is a member of the Connecticut, New York and Greenwich Bar Associations. He is also a member of the Estate Planning Council of Lower Fairfield County. Doug was a 2006 recipient of the Fairfield County Business Journal "40 under 40" Award which recognizes extraordinary business leadership and success in the field of law. Doug lives in Weston, Connecticut, with his wife and two children.

IMPORTANT: Don't forget that we have initiated an incentive program to help drum up membership in the underrepresented categories of financial planning, accounting, insurance and allied professions. If you invite a guest from one of these categories, that guest will be our guest. In other words, effective as of our December 2007 program, they can attend one meeting, free of charge (advance registration required). Space is limited, so we suggest that you reserve a place for yourself and your guest(s) by completing and returning the tear sheet below as soon as possible and no later than Wednesday, January 28. Please let us know in advance if you (or your guest) subsequently find that you are unable to attend.*

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2008-2009 program season!

See you February 4th!

Mary Wall, CFP®, CPA, CTFA
Second Vice President, Programs

***To cancel, please call Lori Somerville at 877-302-6300 no later than Wednesday, January 28.**

If you will attend, please detach and mail to: EPC c/o Lori L. Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

Note: If you are not bringing a guest to this meeting or if you are bringing a free first-time attendee guest (**see applicable categories below*), please feel free to email your registration form (including guest name(s) and other requested info) to Lori at EPC-LFC@comcast.net or call her at 877-302-6300.

____ I will attend the meeting on February 4, 2009.

Member Name: _____ Phone: _____

I will bring the following guests (**if attorney or banking categories, please enclose a check [\$50 per guest] made payable to "EPC/LFC"**):

____ attorney and/or banking guest(s) x \$50 = total amount enclosed: _____

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

Guest Name: _____

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

Professional Category: Accounting Attorney Banking Financial Planning Insurance
 Other (Allied Professional): _____

Guest Name: _____

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

Professional Category: Accounting Attorney Banking Financial Planning Insurance
 Other (Allied Professional): _____

Guest Name: _____

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

Professional Category: Accounting Attorney Banking Financial Planning Insurance
 Other (Allied Professional): _____

Guest Name: _____

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

Professional Category: Accounting Attorney Banking Financial Planning Insurance
 Other (Allied Professional): _____

***Applicable Categories: Effective as of the 12/07 dinner program, there is no guest fee for first-time attendees in the following categories: financial planning, accounting, insurance, and allied professions.**