

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

**Topic:** Look Left, Look Right: a recap of recent planning developments and a best guess about what may lie ahead

**Speaker:** Blanche Lark Christerson, J.D., LL.M., Managing Director, Deutsche Bank Private Wealth Management

**Date & Time:** Wednesday, February 6, 2008 - 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 **Blanche Lark Christerson, Managing Director, Deutsche Bank Private Wealth Management**, will be the guest speaker at our **first dinner program of the New Year on February 6** 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., speakers at 7:30 p.m., and we anticipate an end to the meeting between 8:30 p.m. and 8:45 p.m.**

Ms. Christerson will give a recap of the most recent planning, regulatory and legislative developments, including two cases currently before the Supreme Court: Knight, dealing with the deductibility of trust administration fees, and Kentucky v. Davis, dealing with the constitutionality of tax-exempt muni bond income. It will also address the AMT, changes in the "kiddie tax," possible tax reform, and what the legislative landscape may look like come 2009, when the new administration hits town.

**Blanche Lark Christerson** is a managing director at Deutsche Bank Private Wealth Management, where she works with clients and their advisors to help develop appropriate planning strategies. She is also the author of *Tax Topics*, a monthly commentary on current legislation and other tax issues. Prior to joining Bankers Trust Company (now Deutsche Bank) in 1997, she was in the estate planning department at U.S. Trust for 10 years, and had primary editorial responsibility for *Practical Drafting*, the estate planning publication. Ms. Christerson lectures to various planning and professional organizations nationwide, and is a frequent source for the media. She received her B.A. from Sarah Lawrence College, her J.D. from New York Law School and her LL.M. in taxation from New York University School of Law. Ms. Christerson is a member of the New York State Bar Association, the Bar of the City of New York and the American Bar Association, and is also the president of the Bagby Foundation for the Musical Arts.

**IMPORTANT REMINDER: 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 those categories, that guest will be our guest. In other words, 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 30**. Please let us know in advance if you subsequently find that you are unable to attend.\*

Finally, please be sure to visit our website at [www.epclfc.org](http://www.epclfc.org) for more details as they become available on our 2007-2008 program season!

See you February 6th!

Craig Cerone, CFP®, CTFA, AEP  
Second Vice President, Programs

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

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

**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 e-mail your registration (including guest name(s), if any) to Lori at [EPC-LFC@comcast.net](mailto:EPC-LFC@comcast.net) or call her at 877-302-6300.

\_\_\_\_\_ I will attend the meeting on February 6, 2008.

Member name: \_\_\_\_\_ Phone: \_\_\_\_\_

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

Guest name: \_\_\_\_\_

Guest name: \_\_\_\_\_

Guest name: \_\_\_\_\_

Guest name: \_\_\_\_\_

\_\_\_\_\_ attorney and/or banking guest(s) x \$50 = Total amount enclosed: \_\_\_\_\_

**\*Effective as of our December 2007 dinner program, there is no guest fee for first-time-attendees in the following categories: financial planning, accounting, insurance and allied professions.**