

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

Topic: *2024 Heckerling Highlights*

Speaker: **Jeremiah W. Doyle, IV, J.D., LL.M., Senior Estate Planning Strategist,
BNY Mellon Wealth Management**

Date & Time: **Wednesday, February 7, 2024 – 5:45pm– 8:00pm**

Place: **The Waters Edge at Giovanni’s, 2748 Post Road, Darien, CT 06820**

Dear Council Member:

Please join us for an exciting first dinner meeting of the New Year when we will hear from BNY Mellon’s Jere Doyle as he recaps the 58th Annual Heckerling Institute on Estate Planning Conference held earlier this month. Jere will share key topics and perspectives discussed this year along with implications of recent and anticipated legislation and regulations. We look forward to hearing his insight into how this knowledge can be put to work to help you and your practice.

We will kick off the meeting with cocktails and networking from 5:45pm to 6:30pm, followed by dinner and the presentation by Jere, who is a senior estate planning strategist for BNY Mellon Wealth Management and a senior vice president of BNY Mellon. He has been with the firm since 1981. Jere provides wealthy individuals and families throughout the country with integrated wealth management advice on how to hold, manage, and transfer their wealth in a tax efficient manner.

Guest Attendees: The guest fee is \$85 and guest attendance by a professional colleague is limited to two dinner meetings within a two-year period. Eligible guests and professionals that work and/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 William Murray, CPA, CFF, ASA, ABV, 1st Vice President, Membership, at wmurray@mpival.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below **no later than Monday, February 5th**. **In an effort to reduce the expense of no-shows, please let us know at least 48 hours prior to the event if you (or your guest) need to cancel.*

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2023-2024 program season!

Hope to see you February 7th!

Travis L. Hood, CPA/PFS
Second Vice President, Programs

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

 **This dinner program is proudly sponsored by BNY Mellon Wealth Management.**

TO REGISTER:

If you are NOT bringing a guest: Please register via reply email to EPC-LFC@comcast.net or call our Council Administrator Lori Somerville at 877-302-6300.

If you ARE bringing a guest: There is a registration fee of \$85 per guest, payable by check or through your bank account via Zelle. To register your guest, you may mail the form, or you can complete, scan and email the form or provide the requested information within the body of an email to epc-lfc@comcast.net.

To pay by check: Please mail your check made payable to "EPC-LFC" to: EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

To pay via your bank account using Zelle: Click on "Send Money"; in the "Recipient Name" field enter "Estate Planning Council"; then in the "email field" enter the council's email address epc-lfc@comcast.net; then click on "Add Recipient"; next enter the dollar amount.

REGISTRATION FORM

Member name: _____ Phone: _____

IMPORTANT: For registration/badge purposes, please provide all guest information requested below:

Guest name: _____ Nickname for Badge: _____

Firm: _____ Discipline: _____

Phone: _____ Email: _____

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

Guest name: _____ Nickname for Badge: _____

Firm: _____ Discipline: _____

Phone: _____ Email: _____

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

Guest name: _____ Nickname for Badge: _____

Firm: _____ Discipline: _____

Phone: _____ Email: _____

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