

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

**Topic:** **Caution: Rough Road Ahead. The Sometimes Bumpy Road from Entrepreneur to High Net Worth Investor** (*panel discussion*)

**Moderator:** **Joel Treisman, Chief Learning Officer and Group Chair, Tiger 21**

**Panelists:** **Leslie Quick, Founding Partner, Massey Quick**  
**Greg Rogers, Founder and President, Raylign Advisory LLC and Managing Partner, Raylor Investments**  
**Allen Wolpert, Investor and Retired Partner, Accenture**

**Date & Time:** **Wednesday, February 8 – 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 **Joel Treisman, Chief Learning Officer and Group Chair, Tiger 21**, will be the moderator of a panel discussion titled ***Caution: Rough Road Ahead. The Sometimes Bumpy Road from Entrepreneur to High Net Worth Investor*** at our February 8th Dinner Meeting at **Giovanni's II/ The Water's Edge, 2748 Post Road, Darien, CT. 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.**

Our panelists will share their insights and perspectives on the challenges, pitfalls and process facing entrepreneurs following a wealth-creating "liquidity event." Each of the panelists has been a successful entrepreneur, a wealth-creator, an investor, and an advisor to high net worth individuals and families. Our conversation will delve into the financial and emotional journey these individuals take from being the "CEO of my business" to becoming the "CEO of my wealth."

**Joel Treisman** joined TIGER 21 in 2007 as a New York Group Chair and became the company's Chief Learning Officer in 2010. He chairs two TIGER 21 groups in New York and leads TIGER 21's training and development efforts. TIGER 21 groups meet one full day per month for confidential peer-to-peer dialogue on the "hard" and "soft" issues inherent to post-"liquidity event" wealth. Members of Joel's TIGER 21 groups have rated their meeting experiences as "Excellent" or "Good" 99+ percent of the time. Nicknamed "the group doctor," Joel supports TIGER 21 group leaders across the US and Canada in implementing best practices to create and lead "high performance" groups. With his life-long passion for philanthropy and years of non-profit service, Joel also serves as TIGER 21's Practice Leader in Philanthropy and Non-Profits. Joel is a Certified Individual and Organizational Systems Coach and an experienced group process facilitator with more than twenty-five years of experience in the fields of marketing, product innovation, non-profit management, strategic planning, and leadership development. He is President of Strategic Diligence, LLC, a Westport, Connecticut-based executive coaching and organizational consulting firm he founded in 2001. Joel holds a BA from Stanford University and an MBA from the Yale School of Management.

**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, February 1st.** 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](http://www.epclfc.org) for complete details as they become available on our upcoming breakfast meetings and dinner programs.

See you February 8th!

Carolyn Armbrust, AIBA, ASA  
Second Vice President, Programs

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

***\*\*As of our December 2011 meeting we are no longer offering the "first time free guest" incentive program.***

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**HOW TO REGISTER:**

**If you are NOT bringing a guest:** Please email your RSVP to [EPC-LFC@comcast.net](mailto:EPC-LFC@comcast.net) or call Lori Somerville at 877-302-6300.

**If you ARE bringing a guest:** Please complete the guest registration form below and mail it with a check for \$50 per guest payable to "EPC/LFC" to: EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

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**GUEST 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: \_\_\_\_\_

Designations:  J.D.  Esq.  CFP  CPA  CLU  ChFC  Other \_\_\_\_\_

**Guest name:** \_\_\_\_\_ **Nickname for Badge:** \_\_\_\_\_

Firm: \_\_\_\_\_

Designations:  J.D.  Esq.  CFP  CPA  CLU  ChFC  Other \_\_\_\_\_

**Guest name:** \_\_\_\_\_ **Nickname for Badge:** \_\_\_\_\_

Firm: \_\_\_\_\_

Designations:  J.D.  Esq.  CFP  CPA  CLU  ChFC  Other \_\_\_\_\_

**Guest name:** \_\_\_\_\_ **Nickname for Badge:** \_\_\_\_\_

Firm: \_\_\_\_\_

Designations:  J.D.  Esq.  CFP  CPA  CLU  ChFC  Other \_\_\_\_\_