

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

**Topic:** *Advanced Planning for the Business Owner*

**Speakers:** Michael T. Clear, JD, Partner, Private Client Services Department, Wiggin and Dana

**Date:** Wednesday, February 9, 2022

**Time:** 4:00 p.m. – 5:00 p.m.

**Place:** Via Zoom

Dear Council Member:

We are pleased to announce that our first evening meeting of the New Year will be held virtually via Zoom on **Wednesday, February 9, from 4:00 p.m. to 5:00 p.m.** Our guest speaker will be **Michael T. Clear, JD, Partner, Private Client Services Department, Wiggin and Dana**, on the topic of *Advanced Planning for the Business Owner*. The presentation will run from 4:00 p.m. to 4:45 p.m., followed by fifteen minutes of networking from 4:45 p.m. to 5:00 p.m.

From founders, to serial entrepreneurs, to multi-generational family owned businesses, common challenges face business owners in their estate planning. This presentation will review those common challenges and provide a framework for helping owners move forward in their planning. Also discussed will be buy-sell agreements, advanced estate planning options, and qualified small business stock strategies. [Click here](#) for speaker bio.

**Guest Attendees:**

Due to the fact that we've had to move to all virtual programming, guests are welcome to attend our webinars at no charge. However, our guest policy remains essentially the same: guest attendance by a professional colleague is limited to two *virtual* events 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](http://www.epclfc.org)). Questions regarding membership or the application process can be addressed by Alva Carter-Hasan, our First Vice President, Membership, at 203-930-7129 or [alva.carter-hasan@bofa.com](mailto:alva.carter-hasan@bofa.com).*

Please see below for registration details for members and guests. Note, registration deadline is Monday, February 7th.

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 2021-2022 program season!

We hope you will join us on February 9th!

Todd N. Robison, CLU®  
Second Vice President, Programs

**IMPORTANT REMINDER:**

The deadline to pay your 2021-2022 membership dues was September 30<sup>th</sup>. If you have not yet received your dues renewal notice via email, please contact our Council Administrator Lori Somerville at 877-302-6300 or [epc-lfc@comcast.net](mailto:epc-lfc@comcast.net) to request a duplicate invoice. Thank you.

**If you are NOT bringing a guest:** Please register via reply email to [EPC-LFC@comcast.net](mailto:EPC-LFC@comcast.net) or call Lori Somerville at 877-302-6300. You will receive a confirmation email with instructions to join the meeting a day in advance.

**If you ARE bringing a guest:** Please register your guest by completing and emailing the registration form below, or providing the requested information within the body of an email to [EPC-LFC@comcast.net](mailto:EPC-LFC@comcast.net), or calling Lori Somerville at 877-302-6300.

**IMPORTANT:** Emails must be provided in order for guests to receive the confirmation email with instructions to join the meeting a day in advance.

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## REGISTRATION FORM

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

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

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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

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

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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

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

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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

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

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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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