

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

Topic: *Navigating Tax and Estate Planning Traps for Cross-Border Clients*

Speakers: David M. Halpen, J.D., LL.M., & Brianna L. Marquis, J.D., LL.M.
Cummings & Lockwood LLC

Date: Thursday March 11, 2021

Time: 4:00 p.m. - 5:00 p.m.

Place: Via Zoom

Dear Council Member:

We are pleased to announce that we will be hosting a special session on *Navigating Tax and Estate Planning Traps for Cross-Border Clients* on Thursday, March 11th, 4:00 p.m. to 5:00 p.m., with **David M. Halpen, J.D., LL.M.**, and **Brianna L. Marquis, J.D., LL.M.**, Cummings & Lockwood LLC.

Our presenters will discuss various tax and estate planning issues that arise when representing clients who may have foreign assets or family members living abroad. These issues may involve charitable giving, non-citizen spouses, children or grandchildren living abroad, and moving assets abroad or moving foreign assets to the United States. They will also discuss estate, gift and generation skipping transfer tax traps for international clients and income tax traps for trusts with non-US taxpayers. [Click here](#) for speaker bios.

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). Questions regarding membership or the application process can be addressed by Robin Sherwood, CFP®, our First Vice President, Membership, at 203-972-8262 or robin@htgadvisors.com.*

Please see below for registration details for members and guests. Note, registration deadline is Tuesday, March 9th.

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2020-2021 program season!

We hope you will join us on March 11th!

Alva J. Carter-Hasan
Second Vice President, Programs

IMPORTANT REMINDER:

The deadline to pay your 2020-2021 membership dues was September 30th. 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 to request a duplicate notice. Thank you.

If you are NOT bringing a guest: Please register via reply email to 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, 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.

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: _____

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