

Estate Planning Council of Lower Fairfield County, Inc.

MEETING NOTICE

PLEASE NOTE NEW DATE FOR OUR FEBRUARY DINNER PROGRAM

IMPORTANT:

*If you had registered to attend the February 20th program,
please reconfirm your registration, as well as any invited guests, for the March 13th program.*

- Topic:** *Post-Mortem Planning and Administration – What Every Executor (and Their Advisors) Should Know*
- Speakers:** Gerard F. Joyce, Managing Director, Deputy General Trust Counsel and National Head of Trusts & Estates, Kevin J. Duncan, Managing Director, Director of Estate Administration and Trust Counsel, Brian D. Conboy, Vice President, Senior Estate Settlement Officer, Fiduciary Trust Company International
- Date & Time:** Wednesday, March 13, 2019 – 5:45 p.m. – 8:30 p.m.
- Place:** The J House, 1114 East Putnam Avenue, Greenwich, CT

Dear Council Member:

We are pleased to announce that we have been able to reschedule our guest speakers from **Fiduciary Trust Company International, Gerard F. Joyce, Kevin J. Duncan, and Brian D. Conboy**, who will present on the topic of *Post-Mortem Planning and Administration – What Every Executor (and Their Advisors) Should Know*, for **Wednesday, March 13th**, at **The J House** in Greenwich. Cash bar and cocktails will begin at 5:45 p.m. with passed hors d'oeuvres and buffet station, followed by the speakers at 7:30 p.m., and we anticipate an end to the meeting between 8:30 p.m. and 8:45 p.m.

Join us as our presenters discuss the roles and responsibilities of serving as executor. They will talk about the practical problems executors often encounter and offer insightful tips and tools for addressing these common issues. Among the topics covered will be investment considerations and cash needs, collecting, valuing and insuring unique assets, tax filings and distribution timings. Also discussed will be the common tax elections that all executors must consider during administration and the presentation will end with an overview of the most common audit triggers. [Click here](#) for speaker bios.

Guest Attendees: The guest fee is \$75 and guest attendance by a professional colleague is limited to two dinner meetings 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 Christopher C. Vescio, at 914-358-9888 or Christopher@VescioCPA.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Wednesday, March 6th. 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 for more details as they become available on our 2018-2019 program season!

See you March 13th!

Jennifer M. Pagnillo, J.D.
Second Vice President, Programs

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

HOW TO REGISTER:

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

If you ARE bringing a guest: If you are bringing guest(s), the registration fee is \$75 per guest.

Please complete the registration form below and mail it with your check payable to "EPC/LFC" to:
EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

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: _____ Town: _____

Phone: _____ Email: _____

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

Guest name: _____ **Nickname for Badge:** _____

Firm: _____ Town: _____

Phone: _____ Email: _____

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

Guest name: _____ **Nickname for Badge:** _____

Firm: _____ Town: _____

Phone: _____ Email: _____

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

Guest name: _____ **Nickname for Badge:** _____

Firm: _____ Town: _____

Phone: _____ Email: _____

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