

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

Topic: Roundtable Discussions on The Impact of the SECURE Act on Trusts, Taxes, Wealth Management & Life Insurance

Date & Time: Wednesday, May 11, 2022 – 5:45pm– 8:00pm

Place: Oak & Almond, 544 Main Street, Norwalk, CT 06851

Dear Council Member:

We are excited to announce that we will be hosting **our first in-person meeting since February 2020** on **Wednesday, May 11, 2022, at Oak & Almond**, a farm-to-table restaurant located at 544 Main Street in Norwalk. We will kick off the meeting with cocktails, appetizers and networking on the patio from 5:45pm to 6:30pm, followed by dinner, the election of our 2021-2022 Slate of Officers and Directors, and four rotating roundtable discussions on The Impact of the SECURE Act on Trusts, Taxes, Wealth Management and Life Insurance.

Roundtable Topic #1: Naming trusts as beneficiaries of IRAs under the SECURE Act and proposed regulations
Moderator: Jessie Gilbert, J.D., LL.M., T&E Attorney, Principal, Cummings & Lockwood LLC

Roundtable Topic #2: The new SECURE Act RMD rules and their impact on tax planning
Moderator: Travis Hood, CPA/PFS, Senior Manager, Kahan Steiger & Company, P.C.

Roundtable Topic #3: The SECURE Act's impact on wealth management
Moderators: Robin Sherwood, CFP®, President/COO, HTG Investment Advisors Inc. and Alva Carter-Hasan, Senior Vice President/Senior Trust Officer. Bank of America Private Bank

Roundtable Topic #4: In light of the SECURE Act, repositioning qualified plan assets (using pre-tax dollars to purchase life insurance) - efficiently moving money from the worst place to the best place upon death
Moderator: Todd Robison, CLU®, President/Founder, Cedar Point Financial Services LLC

Roundtable moderators will facilitate fifteen-minute discussions on their respective topics and then rotate to the next table. Attendees will be assigned to one of four tables to ensure that each table has representation from multiple professional disciplines.

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 Alva J. Carter-Hasan, our First Vice President, Membership, at 203-930-7129 or alva.carter-hasan@bofa.com.

Space is limited at this venue, so please reserve a place for yourself and your guest(s) as soon as possible and no later than Monday, May 9th. In an effort to reduce no-shows, please let us know by May 9th if you (or your guest) need to cancel.*

See you May 11th!

Todd Robison, CLU®
Second Vice President, Programs

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

EPC-LFC COVID-19 EVENT PROTOCOLS & POLICY

As part of the registration process, you must acknowledge and accept the terms and conditions contained in our Covid-19 Liability Waiver and Affirmation of Conduct Restrictions. Should you not wish to accept the Terms & Conditions you should not register. Submission of your registration is regarded as affirmation of your acceptance of all Terms &

Conditions. Please note that, at present, we are not requiring proof of vaccination or negative COVID-19 test, although this requirement may change depending on federal, state and local government agencies and officials, EPC-LFC, and the event venue safety recommendations that may be in place at the time of the event. [Click here](#) (or see attached pdf) to read the waiver in full.

If you are NOT bringing a guest: Please register via reply email to EPC-LFC@comcast.net.

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. **Upon receipt of your guest registration (which must include their email), we will follow up with them via email regarding our COVID-19 Liability Waiver and Affirmation of Conduct Restrictions.**

There is a registration fee of \$75 per guest; therefore, please mail a copy of the registration form along 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 all 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 _____