

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

Topic & Speaker: *The Secondary Market for Life Insurance – Current Trends, New Applications*
Jack Elder, J.D., LL.M., Vice President, Account Services, Coventry

Date & Time: 4:15pm-5:30pm, Wednesday, May 12, 2021

Place: Via Zoom

Dear Council Member:

We are pleased to announce that **Jack Elder, J.D., LL.M., Vice President, Account Services for Coventry**, will be the guest speaker on the topic of *The Secondary Market for Life Insurance – Current Trends, New Applications* at our May 12th Annual Meeting during which we will conduct the election of our 2021-2022 Slate of Officers and Directors (see attached), followed by the speaker presentation.

This presentation examines the trends that are driving the secondary market’s continued growth and provides an overview of the five most common applications being used by advisors today. Specifically discussed will be term settlements, policy replacement strategies, Retained Death Benefit Options (with and without a cash settlement) and settlements for smaller face policies, using several case examples to illustrate the concepts being presented. In addition, the seminar will discuss factors that determine a policy’s value and strategies for educating others about the opportunities presented by the market. [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).* *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 Monday, May 10th.

We hope you will join us on May 12th!

Alva J. Carter-Hasan
Second Vice President, Programs

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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