

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

**Topic:** *International Issues for the Domestic Estate Planner*

**Speaker:** G. Warren Whitaker, J.D., Partner, Day Pitney LLP

**Date & Time:** **PLEASE NOTE NEW START/END TIME:**  
Wednesday, May 16, 2018 – 6:00 p.m. – 8:30 p.m.

**Place:** **PLEASE NOTE NEW LOCATION:**  
The J House, 1114 East Putnam Avenue, Greenwich, CT 06878

Dear Council Member:

We are pleased to announce that **Warren Whitaker, J.D., Partner, Day Pitney LLP**, will be the guest speaker at our **May 16<sup>th</sup> Annual Meeting at The J House in Greenwich**. Attorney Whitaker's topic will be "*International Issues for the Domestic Estate Planner*" – even if you don't represent international clients, this presentation will highlight a number of international issues that all domestic estate planning professionals should be aware of.

**The evening will begin with networking, cocktails and substantial hors d'oeuvres from 6:00 p.m. to 7:30 p.m. on the patio, followed by the educational program from 7:30 p.m. to 8:30 p.m. in the Riverside Room.**

G. "Warren" Whitaker assists high net worth individuals and multinational families with complex domestic and international estate planning and related income tax, corporate and personal financial planning. Clients seek his experience with sophisticated international transactions; trust and estate issues, both domestic and international; family office needs; and trust services and fiduciary compliance. He is a former member of the firm's Executive Board.

Warren is a prolific writer and international speaker. Since 2003, he has been published or cited nearly 80 times in respected news sources, such as Bloomberg, The New York Times and Worth Magazine. He is the lead author of *Private Clients Legal and Tax Planning*, published by PLI in 2016, and co-authored the United States sections of *Tottel's Succession Law and Bloomsbury's International Succession Laws*. He has also served in variety of leadership roles in his professional community, including serving as U.S. chair of the U.K.-based Society of Trusts and Estates Practitioners (STEP), member of the STEP Worldwide Council and chair of the Trusts and Estates Law Section of the New York State Bar Association, as well as the Section's International Estate Planning Committee and Estate Administration Committee and a former district representative.

Among his honors and recognitions is selection as a fellow of the prestigious American College of Trusts and Estates Counsel (ACTEC) and its International Estate Planning Committee. For years, Warren's peers have named him to lists of top lawyers. As Chambers USA described him, "Warren Whitaker is the leading figure in the practice and is sought by clients for 'his depth of experience and intellect, and his very good grasp of cross-border taxation.'" Worth Magazine has named Warren as one of the nation's 100 Top Wealth Advisors. He also speaks French. [Click here](#) to learn more about Warren.

**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](http://www.epclfc.org)). Questions regarding membership or the application process can be addressed by Thomas J. Henske, at 212-536-6178 or [thenske@lenoxadvisors.com](mailto:thenske@lenoxadvisors.com).

**Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Thursday, May 10th.** 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](http://www.epclfc.org) for more details as they become available on our 2018-2019 program season!

See you May 16<sup>th</sup>!

Christopher C. Vescio, CPA  
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](mailto: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.

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**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 \_\_\_\_\_