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

Topic: ***Estate Planning for Unmarried Couples: Detriment or Opportunity?***

Speaker: **Joshua S. Rubenstein, JD, Co-Managing Partner, Katten Muchin Rosenman LLP**

Date & Time: **Wednesday, May 5, 2010, 5:45 p.m. – 8:45 p.m.**

Place: **Innis Arden Golf Club, 120 Tomac Avenue, Old Greenwich, CT**

Dear Council Member:

We are pleased to announce that **Joshua S. Rubenstein, JD, Katten Muchin Rosenman LLP, New York,** will be the guest speaker at **the final dinner program of our 2009-2010 program season on Wednesday, May 5th,** at Innis Arden Golf Club in Old Greenwich. Mr. Rubenstein's presentation will focus on ***Estate Planning for Unmarried Couples: Detriment or Opportunity?*** **Registration and cash bar will begin at 5:45 p.m., followed by dinner promptly at 6:30 p.m., speaker at 7:30 p.m., and we anticipate an end to the meeting between 8:30 p.m. and 8:45 p.m.** For directions, visit www.innisardengolfclub.com. ***See Notice of Annual Meeting attached.***

Many basic estate planning techniques are unavailable to unmarried couples - whether opposite sex couples who decline to marry, or same sex couples who are unable to marry or to have their marriage recognized. This session will examine where such couples are discriminated against, how such discrimination can be mitigated, and where special planning opportunities exist.

Joshua S. Rubenstein handles a wide variety of private client matters on a local, national, and international level, including personal and estate planning, the administration of estates and trusts, and contested Surrogate's Court and tax proceedings for high net worth individuals, professionals, entrepreneurs, artists and others with unique intellectual property interests, and is a frequent lecturer and author on these topics. He is an Academician, Member of the Executive Council and Treasurer of the International Academy of Estates and Trusts Law (IAETL), a Fellow and Regent of the American College of Trusts and Estates Counsel (ACTEC), a Member of the U.K.-based Society of Trust and Estate Practitioners (STEP), and a Fellow of the New York Bar Foundation. He is a former chair of the Trusts & Estates Law Section of the New York State Bar Association and of the International Committee of the Real Property and Probate Section of the American Bar Association. Mr. Rubenstein is an adjunct professor at Brooklyn Law School and is the author of the LexisNexis Answer Guide on New York Surrogate's Court Practice. He is often featured or quoted in prominent publications such as the *New York Times, the Wall Street Journal, Crains, Bloomberg, the New York Law Journal, the Washington Post* and *Citywealth.* He is listed in *Best Lawyers in America; Who's Who in American Law, Who's Who in the World; "Top 100 New York Super Lawyers" in New York Super Lawyers (2006-2008); Chambers USA: America's Leading Lawyers for Business* at the Band One level for the Eastern Region in Wealth Management; Chambers USA's Leaders in their Field (2009); Lawdragon's 3000 Leading Lawyers in America; and has been named as one of the "Best Lawyers in New York" by *New York Magazine.* In addition, Mr. Rubenstein has been listed as one of the "Best Lawyers in America" by *American Lawyer;* one of the "Top 100 U.S. Attorneys" by the *Robb Report, Worth Magazine*; the only American in the "Top 20 International Wealth Advisors" and an "Internationally Prominent Figure" by Citywealth (a U.K. weekly); one of the top three North Americans in international private client practices by the Society of Trusts & Estates Practitioners; a "highly recommended" attorney in private client services by Practical Law Company; and one of the "Top 100 Americas Wealth Advisors," in connection with which he was named "U.S. Private Client Attorney of the Year," also by Citywealth. Mr. Rubenstein received his Bachelor of Arts degree in Greek and Latin, *magna cum laude*, in 1976 from Columbia University, where he was elected to *Phi Beta Kappa*, and his Juris Doctor from Columbia Law School in 1979, where he was a Harlan Fiske Stone Scholar. He is admitted to practice law in New York (1980), New Jersey (1980) and before various Federal Courts, including the United States Tax Court.

IMPORTANT: **Don't forget that we have initiated an incentive program to help drum up membership in the underrepresented categories of financial planning, accounting, insurance and allied professions.** If you invite a guest from one of these categories, that guest will be our guest. In other words, effective as of our December 2007 program, they can attend one meeting, free of charge (advance registration required). Space is limited, so we suggest that you reserve a place for yourself and your guest(s) by completing and returning the tear sheet below as soon as possible and no later than Wednesday, April 28. Please let us know in advance if you (or your guest) subsequently find that you are unable to attend.*

I have enjoyed serving as your Program Chair this year and hope that you have found the topics and speakers to be beneficial. If you should have any ideas for future programs, please contact our incoming Programs Chair Steven N. Lerangis, at snl3@ntrs.com.

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2010-2011 program season!

See you May 5th!

James H. Dean, CLU, ChFC
Second Vice President, Programs

To cancel, please call Lori Somerville at 877-302-6300 no later than Wednesday, April 28th.

If you will attend, please detach and mail to: EPC c/o Lori L. Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

Note: If you are not bringing a guest to this meeting or if you are bringing a free first-time attendee guest ***(*see applicable categories below),*** please feel free to email your registration form (including guest name(s) and other requested info) to Lori at EPC-LFC@comcast.net or call her at 877-302-6300.

_____I will attend the meeting on May 5, 2010.

Member Name:____ Phone:______________________

I will bring the following guests **(if attorney or banking categories, please enclose a check [$50 per guest] made payable to "EPC/LFC"):** _____ attorney and/or banking guest(s) x $50 = total amount enclosed:_____

IMPORTANT: For registration/ badge purposes, please provide guest name, firm, designations, and professional category.

Guest Name:____

Firm:____

Designations: ❒ J.D. ❒ Esq. ❒ CFP ❒ CPA ❒ CLU ❒ ChFC Other:_______________

Professional Category: ❒ Accounting ❒ Attorney ❒ Banking ❒ Financial Planning ❒ Insurance
❒ Other (Allied Professional):____

Guest Name:____

Firm:____

Designations: ❒ J.D. ❒ Esq. ❒ CFP ❒ CPA ❒ CLU ❒ ChFC Other:_______________

Professional Category: ❒ Accounting ❒ Attorney ❒ Banking ❒ Financial Planning ❒ Insurance
❒ Other (Allied Professional):____

Guest Name:____

Firm:____

Designations: ❒ J.D. ❒ Esq. ❒ CFP ❒ CPA ❒ CLU ❒ ChFC Other:_______________

Professional Category: ❒ Accounting ❒ Attorney ❒ Banking ❒ Financial Planning ❒ Insurance
❒ Other (Allied Professional):____

Guest Name:____

Firm:____

Designations: ❒ J.D. ❒ Esq. ❒ CFP ❒ CPA ❒ CLU ❒ ChFC Other:_______________

Professional Category: ❒ Accounting ❒ Attorney ❒ Banking ❒ Financial Planning ❒ Insurance
❒ Other (Allied Professional):____

***Applicable Categories: Effective as of the 12/07 dinner program, there is no guest fee for first-time attendees in the following categories: financial planning, accounting, insurance, and allied professions.**