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

Topic: ***Planning at Death's Door: Estate Planning for the Terminally Ill Client***

Speakers: **T. Randolph Harris & Barbara A. Sloan, McLaughlin & Stern, LLP**

Date & Time: **Wednesday, May 7, 2008 - 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 **T. Randolph Harris & Barbara A. Sloan/McLaughlin & Stern, LLP,** will be the guest speakers at our **final dinner program of the year on Wednesday, May 7,** at Innis Arden Golf Club in Old Greenwich. **Cash bar and cocktails will begin at 5:45 p.m., followed by dinner promptly at 6:30 p.m., speakers 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

When a client's actual life expectancy is significantly shorter than his or her actuarial life expectancy, very powerful estate and income tax saving opportunities are presented. This program will focus on both the "two years to live" and "death is expected tomorrow" scenarios, including a discussion of specific state estate tax saving techniques available in many decoupled states (but not Connecticut).

T. Randolph Harris is a partner in the NYC law firm of McLaughlin & Stern, LLP, where he is co-chair of the fourteen-partner Trusts and Estates Department. Before joining McLaughlin & Stern in 2000, he practiced in the trust and estate area for 21 years at other New York City firms. Mr. Harris is a graduate of Princeton University and New York University School of Law, from which he also received a Master of Laws in Taxation. He is admitted to practice in New York and New Jersey, as well as before the United States Tax Court. Mr. Harris' practice relates primarily to estate planning and related tax issues, and also includes charitable gift planning, the administration of estates and trusts, the handling of estate and gift tax appeals and the resolution of controversies in the New York Surrogate's Court. Mr. Harris is a Fellow of the American College of Tax Counsel and of the American College of Trust and Estate Counsel, where he is a past Chair of the Fiduciary Income Tax Committee and a former member of the Executive Committee of the Board of Regents. He is an active member of the Tax Section of the American Bar Association, where he is a past Chair of the Committee on Fiduciary Income Tax and the Tax Practice Management Committee, and of the Real Property, Probate & Trust Law Section, where he is a past Council member and chair of various committees.. He is also a member of the New York State Bar Association, where he recently served on the Executive Committee of the Tax Section and as co-chair of that section's Trust & Estate Committee, and the Association of the Bar of the City of New York, where he has served on the Estate and Gift Tax Committee and the Trusts, Estates and Surrogate's Courts Committee. Mr. Harris is a member of the Tax Management Estates, Gifts and Trusts Advisory Board, a member of the Surrogate's Court Advisory Committee of the New York State Office of Court Administration. He is a member of the American Law Institute and a Fellow of the American Bar Foundation and also serves on the Princeton University Planned Giving Advisory Committee and the Rockefeller University Committee on Trust and Estate Gift Plans, and co-chairs the Simon Wiesenthal-New York Tolerance Center Professional Advisory Board. Mr. Harris is an Adjunct Professor of Law at the NYU School of Law, where he teaches Estate Planning in the Graduate Tax Law Program. He is the author of numerous articles on estate planning and related issues and has lectured in recent years for many organizations locally and around the country.

Barbara A. Sloan is a partner in the NYC law firm of McLaughlin & Stern, LLP. She began her estate and trust practice in Washington, D.C. before moving her practice to New York in 1998. Her practice involves estate planning, the administration of estates and trusts, trustee and beneficiary litigation, business succession planning and tax-exempt organization work. Ms. Sloan is a graduate of the Washington College of Law, American University, where she received her J.D., *cum laude*, and is a member of the Washington College of Law Honor Society. She also holds a B.A. in philosophy from George Washington University and an M.A. in clinical psychology from the University of Maryland. She is admitted to practice law in New York, the District of Columbia, Maryland and Pennsylvania. Ms. Sloan is a fellow of the American College of Trust and Estate Counsel, where she serves as Chair of the Fiduciary Income Tax Committee. She is active in local and national bar associations, serving as past Chair of the Estate and Gift Tax Committee and the Tax Practice Management Committee of the Tax Section of the American Bar Association, past Chair of the Estate and Gift Tax Committee of the New York City Bar Association, and Council Member of the Real Property, Trust and Estate Law Section of the ABA. Ms. Sloan is an Adjunct Professor in the Graduate Tax Law program at New York University Law School, where she teaches Estate Planning. She lectures and publishes nationally on a variety of estate planning topics and delivered the American Trollope Society 2001 Annual Lecture on Selected Problems in the Victorian Law of Inheritance and their Effect on the Lives of Women. She is listed in the 2007 and 2008 editions of The Best Lawyers in America.

IMPORTANT REMINDER: **Don't forget that we 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 those categories, that guest will be our guest. In other words, 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 30.** Please let us know in advance if you 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 Mary Wall, CFP®, CPA, at mary.wall@ustrust.com.

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2008-2009 program season!

See you May 7th!

Craig Cerone, CFP®, CTFA, AEP,
Second Vice President, Programs

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

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

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 e-mail your registration (including guest name(s), if any) to Lori at EPC-LFC@comcast.net or call her at 877-302-6300.

_____ I will attend the meeting on May 7, 2008.

Member name:____Phone:___________________________

*I will bring the following guests **(if attorney or banking categories, please enclose a $50 check per guest made payable to "EPC/LFC"):**

Guest name:____

Guest name:____

Guest name:____

Guest name:____

_____ attorney and/or banking guest(s) x $50 = Total amount enclosed:____________

***Effective as of our December 2007 dinner program, there is no guest fee for first-time-attendees in the following categories: financial planning, accounting, insurance and allied professions.**