

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

Topic: Cultivating the Ultra-Affluent

Speakers: Hannah Shaw Grove, HSGrove Private Wealth Consultancy and Prince & Associates

Date & Time: Wednesday, May 8, 2013 – 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 **Hannah Shaw Grove, of HSGrove Private Wealth Consultancy and Prince & Associates**, will be our guest speaker on the subject of *Cultivating the Ultra-Affluent* at our May 8th Annual Meeting & Dinner Program. Cash bar and cocktails 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.

Ms. Grove will share qualitative and quantitative research from the ultra-high-net-worth community and their closest advisors to shed light on the key trends and influences that shape their preferences and priorities regarding wealth management, estate planning and other key high-end services.

Ms. Grove is a respected author, columnist and speaker and a leading authority on the mindset, behavior, concerns, preferences and finances of high-net-worth individuals. She spent more than 15 years in the financial services industry working closely with affluent investors and their advisors to develop sophisticated financial, planning and servicing solutions. She is the executive editor of Private Wealth, the first and only magazine for professionals with ultra-affluent clients, and Cultivating the Affluent, a practice management newsletter for financial professionals. Her body of work also includes eight books and numerous reports on private wealth and related topics, and regular columns for commercial, trade and online publications, including Elite Traveler, Worth and Financial Advisor. Ms. Grove is the principal of HSGrove Private Wealth Consultancy, and an equity partner of Prince & Associates, Inc., the leading high-net-worth research firm. She consults to companies and entrepreneurs on marketing to the wealthy, and does one-on-one coaching with financial professionals on business growth and practice management. She is a cum laude graduate of Harvard University and lives in the New York-metro area.

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, May 1st. Please let us know in advance if you subsequently find that you or your guest will be unable to attend.*

IMPORTANT UPDATE REGARDING OUR GUEST POLICY: The Board has decided to amend the guest attendance policy. Effective May 8, 2013, a guest is permitted to attend only two dinner meetings within any two-year period. *(Of course, if you think that your guest would like to attend more than two dinner meetings, please encourage him or her to submit an application for membership, which can be downloaded from our website at www.epclfc.org or you can request an application from Lori Somerville at 877-302-6300 or epc-lfc@comcast.net.)*

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 have any ideas for future programs, please contact our incoming Programs Chair Alessandra DiMauro at alessandra@roundtableservices.com.

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2013-2014 program season!

See you May 8th!

Matthew A. Bovino
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 or call Lori Somerville at 877-302-6300.

If you ARE bringing a guest: Please complete the guest registration form below and mail it with a check for \$50 per guest payable to "EPC/LFC" to: EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

GUEST REGISTRATION FORM

Member name: _____ Phone: _____

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

Guest name: _____ **Nickname for Badge:** _____

Firm: _____

Phone: _____ Email: _____

Designations: J.D. Esq. CFP CPA CLU ChFC Other _____

Guest name: _____ **Nickname for Badge:** _____

Firm: _____

Phone: _____ Email: _____

Designations: J.D. Esq. CFP CPA CLU ChFC Other _____

Guest name: _____ **Nickname for Badge:** _____

Firm: _____

Phone: _____ Email: _____

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