

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

**Topic:** The Global Capital Markets – Opportunities and Risks – in a Presidential Election Year Amidst Global Unrest and Uncertainties

**Speaker:** Ben Goetsch, CFA, Senior Investment Strategist, Bernstein Private Wealth Management  
Kelly Clements, Wealth Advisor, Bernstein Private Wealth Management

**Date & Time:** Wednesday, May 8, 2024 – 5:45pm– 8:00pm

**Place:** The Waters Edge at Giovanni’s, 2748 Post Road, Darien, CT 06820

Dear Council Member:

Please join us for the last dinner meeting of our 2023-2024 program season on Wednesday, May 8, at The Waters Edge at Giovanni’s in Darien. We will kick off the meeting with cocktails and networking from 5:45pm to 6:30pm, followed by dinner and a timely session on *The Global Capital Markets – Opportunities and Risks – in a Presidential Election Year Amidst Global Unrest and Uncertainties* presented by Ben Goetsch, CFA, Senior Investment Strategist, Bernstein Private Wealth Management, and Kelly Clements, a Bernstein Wealth Advisor.

Kelly will introduce the firm and share a high-level introduction of how her team engages in different levels of planning for the benefit of their clients. At Bernstein, no two clients are alike and planning is at the heart of the advice they render. Kelly will speak about Bernstein’s sophisticated planning capabilities, and the importance of understanding a client’s “Core Capital” - the amount of money that a person would need to have in their portfolio today to sustain their expenses with a high degree of confidence over their lifetime. Ben will be sharing Bernstein Private Wealth Management’s research and perspective on the global capital markets and how the firm manages client portfolios, including investment opportunities to focus on and those to avoid. [Click here](#) for speaker bios.

**Guest Attendees:** The guest fee is \$85 and guest attendance by a professional colleague is limited to two dinner meetings within a two-year period. Eligible guests and professionals that work and/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 William Murray, CPA, CFF, ASA, ABV, 1st Vice President, Membership, at [wmurray@mpival.com](mailto:wmurray@mpival.com).

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below **no later than Monday, May 6<sup>th</sup>**. *\*In an effort to reduce the expense of no-shows, please let us know at least 48 hours prior to the event if you (or your guest) need to cancel.*

Hope to see you May 8th!

Travis L. Hood, CPA/PFS  
Second Vice President, Programs

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



This dinner program is proudly sponsored by Bernstein Private Wealth Management.

**TO REGISTER:**

**If you are NOT bringing a guest:** Please register via reply email to [EPC-LFC@comcast.net](mailto:EPC-LFC@comcast.net) or call our Council Administrator Lori Somerville at 877-302-6300.

**If you ARE bringing a guest:** There is a registration fee of \$85 per guest, payable by check or through your bank account via Zelle. To register your guest, you may mail the form, or you can complete, scan and email the form or provide the requested information within the body of an email to [epc-lfc@comcast.net](mailto:epc-lfc@comcast.net).

**To pay by check:** Please mail your check made payable to "EPC-LFC" to: EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

**To pay via your bank account using Zelle:** Click on "Send Money"; in the "Recipient Name" field enter "Estate Planning Council"; then in the "email field" enter the council's email address [epc-lfc@comcast.net](mailto:epc-lfc@comcast.net); then click on "Add Recipient"; next enter the dollar amount.

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## REGISTRATION FORM

Member name: \_\_\_\_\_ Phone: \_\_\_\_\_

**IMPORTANT: For registration/badge purposes, please provide all guest information requested below:**

Guest name: \_\_\_\_\_ Nickname for Badge: \_\_\_\_\_

Firm: \_\_\_\_\_ Discipline: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Designations:  J.D.  Esq.  CFP®  CPA  CLU  ChFC  Other \_\_\_\_\_

Guest name: \_\_\_\_\_ Nickname for Badge: \_\_\_\_\_

Firm: \_\_\_\_\_ Discipline: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Designations:  J.D.  Esq.  CFP®  CPA  CLU  ChFC  Other \_\_\_\_\_

Guest name: \_\_\_\_\_ Nickname for Badge: \_\_\_\_\_

Firm: \_\_\_\_\_ Discipline: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Designations:  J.D.  Esq.  CFP®  CPA  CLU  ChFC  Other \_\_\_\_\_