

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

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.

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 Ben’s bio.

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). 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.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below **no later than Monday, May 6th**. **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 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.

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; then click on "Add Recipient"; next enter the dollar amount.

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 _____