

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

Topic: *Sustainable Investing & Fiduciary Duty*

Speakers: **Emily Brunner, Wealth Advisor, Zach Chafitz, Investment Specialist, and Victoria F. Bolton, JD, Managing Director & Wealth Advisor, JP Morgan Private Bank**

Date & Time: **Wednesday, October 26, 2022 – 5:45pm– 8:00pm**

Place: **Giovanni's II/The Water's Edge, 2748 Post Road, Darien, CT 06820**

Dear Council Member:

We are excited to announce that our first dinner meeting of the fall season will be held in person on **Wednesday, October 26, 2022, at Giovanni's II/The Water's Edge**. We will kick off the meeting with cocktails and networking from 5:45pm to 6:30pm, followed by dinner and a panel discussion on *Sustainable Investing & Fiduciary Duty* that will address the ever-increasing interest in values-based investing, how we define sustainable investing, and the potential implications to a trustee's fiduciary obligations. [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). Questions regarding membership or the application process can be addressed by Travis L. Hood, CPA/PFS, our First Vice President, Membership, at 203-327-5717 or Travis@kahansteiger.com.

Please reserve a place for yourself and your guest(s) by completing and returning the tear sheet below no later than Wednesday, October 19th. **In an effort to reduce no-shows, please let us know by October 24th if you (or your guest) need to cancel.*

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2022-2023 program season!

See you October 26th!

Todd Robison, CLU®
Second Vice President, Programs

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

IMPORTANT REMINDER:

The deadline to pay your 2022-2023 membership dues is October 15th. If you have not yet received your dues renewal notice via email, please contact our Council Administrator Lori Somerville at 877-302-6300 or epc-lfc@comcast.net to request a duplicate invoice. Thank you.

EPC-LFC COVID-19 EVENT PROTOCOLS & POLICY

As part of the registration process, you must acknowledge and accept the terms and conditions contained in our Covid-19 Liability Waiver and Affirmation of Conduct Restrictions. Should you not wish to accept the Terms & Conditions you should not register. Submission of your registration is regarded as affirmation of your acceptance of all Terms & Conditions. **Please note that, at present, we are not requiring proof of vaccination or negative COVID-19 test,** although this requirement may change depending on federal, state and local government agencies and officials, EPC-LFC, and the event venue safety recommendations that may be in place at the time of the event. [Click here](#) to read the waiver in full.

If you are NOT bringing a guest: Please register via reply email to EPC-LFC@comcast.net.

If you ARE bringing a guest: Please register your guest by completing and emailing the registration form below or providing the requested information within the body of an email to EPC-LFC@comcast.net. **Upon receipt of your guest registration (which must include their email), we will follow up with them via email regarding our COVID-19 Liability Waiver and Affirmation of Conduct Restrictions.**

There is a registration fee of \$85 per guest; therefore, please mail a copy of the registration form along with your check payable to "EPC/LFC" to: EPC c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555.

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 _____