

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

Topic: *Recent Developments in Estate Planning from the 2023 Heckerling Institute on Estate Planning*

Speaker: Steven Lavner, Managing Director, Wealth Strategies, Bank of America

Date & Time: Wednesday, February 15, 2023 – 5:45pm– 8:00pm

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

Dear Council Member:

We are pleased to announce that our next dinner meeting will be held on **Wednesday, February 15, 2023, 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 presentation by **Steven Lavner, Managing Director, Wealth Strategies, Bank of America**, on *Recent Developments in Estate Planning from the 2023 Heckerling Institute on Estate Planning*.

[Steven Lavner](#), a Managing Director and a Wealth Strategies Advisor for the Chief Investment Office (CIO) within Bank of America, will share highlights of the recent Heckerling Institute conference, including:

- Transfer Tax Exemptions and Rates
- Simplified Extension of Time to Elect Portability
- Proposed Anti-Abuse Clawback Regulations
- Valuation: Formula Gifts and Sales
- Abuse of Substance in Transfer Tax Transactions
- FLP/LLC 2036 Planning

Guest Attendees: The guest fee is \$85 and guest attendance by a professional colleague is limited to two dinner meetings or breakfast webinars 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, February 8th. **In an effort to reduce no-shows, please let us know by February 13th 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 February 15th!

Todd Robison, CLU®
Second Vice President, Programs

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

BANK OF AMERICA  This dinner program is proudly sponsored by Bank of America.

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 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. **Important:** 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.

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 _____