

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

Topic: *Behind the Curtain: How Corporate Trustees Make Decisions*

Panelists: **Jaclyn G. Feffer, J.D., LL.M., Senior Fiduciary Counsel, & Peter J. Slater, J.D., LL.M., Senior Fiduciary Counsel, Bessemer Trust (Moderator, Thomas J. Healy Jr., Principal, Senior Client Advisor, Bessemer Trust)**

Date & Time: **Wednesday, February 5, 2025 – 5:45pm– 8:00pm**

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

Dear Council Member:

Please join us for our dinner meeting on Wednesday, February 5, 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 the panel discussion on *Behind the Curtain: How Corporate Trustees Make Decisions*.

Bessemer Trust serves as corporate trustee for a significant percentage of its clients. This presentation will (i) provide an overview of a trustee’s fiduciary duties, (ii) describe the process Bessemer follows when evaluating and making discretionary distributions to beneficiaries, and (iii) discuss factors to be considered when exercising the power to adjust and other fiduciary powers.

Ms. Feffer (panelist) is Managing Director and Senior Fiduciary Counsel at Bessemer Trust. In this role, she is responsible for working with clients and their advisors to develop practical and efficient wealth transfer plans, and for guiding the firm on fiduciary issues. Jackie also oversees the Bessemer Giving Fund and is a member of the firm’s Leadership Council.

Mr. Slater (panelist) is Managing Director and Senior Fiduciary Counsel at Bessemer Trust. In this role, he is responsible for working with clients and their advisors to develop practical and efficient wealth transfer plans, and for guiding the firm on fiduciary issues.

Mr. Healy (moderator) is Principal and Senior Client Advisor at Bessemer Trust. In this role, he leads a team responsible for providing clients with proactive, highly personalized advice across Investment Management, Wealth Planning, and Family Office Services. Thom is a member of the firm’s Officers Committee.

[Click here](#) to learn more about our presenters.

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 Christopher Martens, CIC, CWCC, CPRIA, 1st Vice President, Membership, at epc-lfc@comcast.net.

Please reserve a place for yourself and your guest(s) by registering no later than Monday, February 3rd. *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.*

Finally, please be sure to visit our website at www.epclfc.org for more details as they become available on our 2024-2025 program season!

See you February 5th!

Stefania L. Bartlett, Esq.
Second Vice President, Programs

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

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 _____