

The Estate & Tax Planning Council of Eastern Connecticut
&
The Community Foundation of Southeastern Connecticut
present in partnership with

Andrews & Young, P.C. · Bank of America · Cole-Chu & Cipparone, LLC ·
Dime Bank · Lawrence & Memorial Hospital · Orobello & Associates, Inc. ·
Pochal & Pochal, LLC · Smith Barney-Mystic · Tedford & Ceddia, P.C. ·
Waller, Smith & Palmer, P.C. · The Washington Trust Company

The Cannon Financial Institute 2009 Estate Planning Teleconference Series

featuring Roy M. Adams, Esq. and special guests (Visit www.cannonfinancial.com)

Join us for one or more of these free educational seminars (continuing education credits offered)
at The Community Foundation's offices — 147 State Street, New London

*≈ALL SESSIONS ARE 12:30 – 2:30 pm≈
(lunch provided at 12:30/teleconference begins promptly at 1:00)*

*A monthly e-mail notice will be sent out. RSVP (for accurate lunch count/copies of materials) to
Alison Woods at The Community Foundation ~ 860-442-3572 or alison@cfsect.org*

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| Tuesday, January 20
(rsvp by Jan. 13) | New Opportunities Created From the Increased Federal Exemption Amount – What Has Changed? <i>sponsored by Cole-Chu & Cipparone, LLC</i> |
| Tuesday, February 24
(rsvp by Feb. 17) | Recent Developments Affecting Estate Planning for 2009 and Beyond
<i>sponsored by Lawrence & Memorial Hospital</i> |
| Tuesday, March 24
(rsvp by March 17) | Fiduciary Law- The Numerous Duties and Demands
<i>sponsored by The Washington Trust Company</i> |
| Tuesday, April 21
(rsvp by April 14) | Special Planning Concerns for Younger Clients
<i>sponsored by Jim Thevenet, CFP, ChFC, CLU; Agent and Advisor with New York Life Insurance Co, Groton</i> |
| Tuesday, May 19
(rsvp by May 12) | Special Planning Concerns for Older Clients
<i>sponsored by Andrews & Young, P.C.</i> |
| Tuesday, June 16
(rsvp by June 9) | Important Rules for Fiduciaries and Their Counsel
<i>sponsored by Pochal & Pochal, LLC</i> |
| Tuesday, July 21
(rsvp by July 14) | Beneficiary Rights – Fact of Fiction
<i>sponsored by Tedford & Ceddia, P.C.</i> |
| Tuesday, August 25
(rsvp by August 18) | The Conflicts Between Federal & State Laws – Unfriendly Encounters
<i>sponsored by Orobello & Associates, Inc.</i> |
| Tuesday, September 15
(rsvp by September 8) | Retirement Benefits & Estate Planning – What's New?
<i>sponsored by Bank of America</i> |
| Tuesday, October 20
(rsvp by Oct. 13) | Directed Trusts – Understanding the Risks & Avoiding Liability
<i>sponsored by Dime Bank's Trust Department</i> |
| Tuesday, Nov. 17
(rsvp by Nov. 10) | A Litigator's Perspective on Fiduciary Liability
<i>sponsored by Smith Barney-Mystic</i> |
| Tuesday, Dec. 8
(rsvp by Dec. 1) | Common Options for Small, Medium and Large Estates
<i>sponsored by Waller, Smith & Palmer, P.C.</i> |