

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

Andrews & Young, P.C. · Bank of America · Kepple, Cole-Chu, Cipparone, Avena & Zaccaro, P.C. ·  
Dime Bank · Lawrence & Memorial Hospital · The GSW Group at Merrill Lynch · Orobello & Associates, Inc. ·  
Pochal & Pochal, LLC · Tedford & Ceddia, P.C. · Jim Thevenet, CFP, ChFC, CLU ·  
Waller, Smith & Palmer, P.C. · The Washington Trust Company

*present*

**The Cannon Financial Institute 2010 Estate Planning Teleconference Series**

*featuring Roy M. Adams, Esq. and special guests (Visit [www.cannonfinancial.com](http://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 – 2:00 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](mailto:alison@cfsect.org)*

- Tuesday, January 12 (rsvp by 1/6)     **Recent Developments: Government Instructions for a Wave of New Laws** *sponsored by the Washington Trust Company*
- Tuesday, February 23 (rsvp by 2/17)     **Creating Wealth by Legal Means, Through Shifting Wealth by Legal Means**  
*sponsored by Jim Thevenet, CFP, ChF, CLU*
- Tuesday, March 23 (rsvp by 3/17)     **A Trust or Account for Every Purpose under the Sun**  
*sponsored by Pochal & Pochal, LLC*
- Tuesday, April 20 (rsvp by 4/14)     **Guidance and Sanctions for Ethical Behavior Move More to the Left and More to the Right**  
*sponsored by Andrews & Young, P.C.*
- Tuesday, May 25 (rsvp by 5/19)     **The Use of Wealth to Modify Behavior**  
*sponsored by Kepple, Cole-Chu, Cipparone, Avena & Zaccaro, P.C.*
- Tuesday, June 15 (rsvp by 6/9)     **GRITs and GRATs for Traditional Family Planning – Protecting State and Federal Exemption Levels** *sponsored by the GSW Group at Merrill Lynch*
- Tuesday, July 27 (rsvp by 7/21)     **Fiduciary Mistakes and Learning from Them & Knowing Fiduciary Boundaries**  
*sponsored by Dime Bank Trust Department*
- Tuesday, August 17 (rsvp by 8/11)     **Suing Estate Planners – New Opportunities for Litigators?**  
*sponsored by Tedford & Ceddia, P.C.*
- Tuesday, September 21 (rsvp by 9/15)     **The World of Irrevocable Life Insurance Trusts – Funding and Maintenance**  
*sponsored by Orobello & Associates, Inc.*
- Tuesday, October 19 (rsvp by 10/13)     **Retirement Benefit Planning for the Non-Retirement Benefits Specialist**  
*sponsored by Waller Smith & Palmer, P.C.*
- Tuesday, November 16 (rsvp by 11/10)     **The Rocky Road Ahead for Charitable Giving**  
*sponsored by the Lawrence & Memorial Hospital*
- Tuesday, December 7 (rsvp by 12/1)     **Gathering Necessary Data for Estate Planning & Obtaining New Business from Prospective or Existing Clients** *sponsored by Bank of America*