

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

The William W. Backus Hospital ▪ Bank of America/U.S Trust ▪ Cole-Chu, Cipparone & Zaccaro, P.C. ▪  
Dime Bank ▪ Grenger Law Offices ▪ Law Office of P. Michael Lahan ▪  
Lawrence & Memorial Hospital ▪ McGuire & McGuire ▪ Pochal & Pochal, LLC ▪  
Jim Thevenet, CFP ▪ Tedford & Ceddia, P.C. ▪ The Washington Trust Company

*present*

**The Cannon Financial Institute 2012 Estate Planning Teleconference Series**  
([www.estateplanningteleconference.com](http://www.estateplanningteleconference.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@cfect.org](mailto:alison@cfect.org)*

- Tuesday, January 24    ***Mid-Winter's Hottest Estate Planning  
Recent Developments***    Sponsored by The Washington Trust Company
- Tuesday, February 21    ***Practical Retirement Benefits Planning for Your Clients' Needs***  
Sponsored by Jim Thevenet, CFP
- Tuesday, March 20    ***Getting Ready for April 15<sup>th</sup> – Trust Income Tax issues Faced by Estate Planning  
Practitioners***    Sponsored by Tedford & Ceddia, P.C.
- Tuesday, April 24    ***Winning the Battles Between Fiduciaries and Beneficiaries in Trust and Estate  
Administration***    Sponsored by Bank of America/US Trust
- Tuesday, May 22    ***Is Your Ethical House in Order? Critical Issues and Serious Consequences for Estate  
Planning Practitioners***    Sponsored by McGuire & McGuire
- Tuesday, June 19    ***Passing the Torch Without Dousing the Flame: Estate Planning for Closely-held Business  
Owners***    Sponsored by Cole-Chu, Cipparone & Zaccaro, PC
- Tuesday, July 24    ***Helping Clients Identify and Achieve Their Asset Protection Objectives***  
Sponsored by Dime Bank Trust Department
- Tuesday, August 21    ***Trust Funding Issues from the Trenches***  
Sponsored by the Law Office of P. Michael Lahan
- Tuesday, Sept. 18    ***Estate Planning with Life Insurance: ILITs and More***  
Sponsored by The William W. Backus Hospital
- Tuesday, Oct. 16    ***Making a Difference in Advising Philanthropic Clients***  
Sponsored by Lawrence & Memorial Hospital
- Tuesday, Nov. 13    ***If You're Not Paranoid, You're Not Paying Attention: Fiduciary Liability and Ethical  
Considerations***    Sponsored by Pochal & Pochal, LLC
- Tuesday, Dec. 11    ***Recent Developments in Estate Planning: Round 2***  
Sponsored by the Grenger Law Offices