

**Tax and estate laws keep changing...**

**How does that affect you?**

Learn the latest on these and other issues from experienced Mid-Hudson Valley estate planners.

# HUDSON VALLEY ESTATE PLANNING DAY

Sponsored by the Hudson Valley Estate Planning Council in cooperation with the SUNY New Paltz Foundation

**Saturday, October 24, 2009**

SUNY New Paltz  
Student Union Building,  
Main Campus Entrance  
S. Manheim Blvd.

8:45 a.m.

## **Estate Planning Is Essential**

Estate Planning Day is presented by experienced Hudson Valley estate planners – attorneys, accountants, financial planners, insurance professionals and planned giving professionals, to help you:

- Avoid the hazards of an unplanned estate
- Understand simple steps that minimize estate complications and taxes
- Learn about recent changes in estate taxes, retirement plans and other areas

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## **Community Supporters**

About Town

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## Schedule

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### 8:00 – 8:45

#### Registration

### 8:45

#### Welcome, introductions

#### **Stewart Glenn, Esq. A.E.P.**

Glenn & Brehenny  
Newburgh, N.Y.

#### **Sally Cross**

SUNY New Paltz Foundation

#### **Leonard H. Neiman, AEP, CLU, ChFC**

Council Relations Liaison, National  
Board of Directors, National  
Association of Estate Planner & Councils

### 9:00-9:35

#### **I. Will You Still Love Me?**

Social Security & Medicare

#### **Edward Sarkies**

Social Security Field Representative  
Ulster County, N.Y.

### 9:40-10:10

#### **II. Who's Got the Power?**

#### **Advance Directives**

Powers of Attorney

#### **Bernard Krooks, Esq.**

Littman Krooks LLP  
White Plains, N.Y.  
Fishkill, N.Y.

### 10:10-10:45

#### **III. What's In It for Them?**

#### **Wills & Trusts**

Need for Wills; Uses of Trusts

#### **Michael Markhoff, Esq.**

Danziger & Markhoff LLP  
White Plains, N.Y.

### 10:45-11:10

#### **Networking Break**

### 11:10-11:40

#### **IV. Where Will My Money Go?**

#### **IRAs**

Naming beneficiaries; IRA payouts

#### **Michael E. Brown CFP, CIMA:**

Madison Wealth Managers, LLC  
Clifton Park, N.Y.

### 11:45-12:15

#### **V. Why Be Charitable?**

#### **Charitable Giving**

#### **Lisa Newfield, Esq:**

McCarthy Fingar LLP  
White Plains, N.Y.

### 12:20-12:50

#### **VI. How to Pay for It?**

#### **Long Term Care Insurance**

#### **Bob Vandy, CLU, ChFC, LUTCF, CLTC**

New York & National Long Term  
Care Brokers  
Clifton Park, N.Y.

#### **Concluding Remarks - Lunch**

Speakers and other professionals will be  
available during the breaks and lunch to address  
questions concerning your specific situation.

### **Estate Planning Day Participants Receive**

- A bound guide with information from experienced Hudson Valley estate planners to act as a reference
- Lunch and refreshments during registration and breaks
- Convenient free parking

## Hudson Valley Estate

### Planning Day

#### Registration Form (Please Print)

\_\_\_\_\_  
Name(s)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

*For registration only; you will not be solicited.*

Please reserve \_\_\_\_\_ spaces at \$20 per person

Total enclosed: \$ \_\_\_\_\_

- Please make checks payable to:  
*Hudson Valley Estate Planning Council*  
www.hvepc.org
- Send to:  
Hudson Valley Estate Planning Council  
372 South Plank Rd., Suite 2  
Newburgh, NY 12550
- For more information call Celeste at  
(845) 564-3654, DeLorenzo Financial  
Planning Lpl
- **Reserve early – seating is limited**