

**HUDSON
VALLEY
ESTATE
PLANNING
COUNCIL**

**PLEASE JOIN US FOR
THE COUNCIL'S
DINNER MEETING**

Date: Wednesday, April 24, 2013
Location: Ship Lantern Inn, 1725 Route 9W, Milton, NY
Time: Cocktail Hour - 5:00 – 6:00 p.m. Speaker and Dinner - 6:00 p.m.
Cost: \$50 per member / \$75 per guest
Speaker: Julie Min Chayet, Esq. of Fiduciary Trust Company International
Topic: Tactical Decisions in Estate Planning and Investment Management

This course discusses many of the estate planning opportunities available in a low interest rate environment. Specific attention is paid to grantor retained annuity trusts, charitable lead annuity trusts, intra-family lending, qualified personal residence trusts and sales to grantor trusts; and why these opportunities are advantageous today, as opposed to in a higher interest rate environment. Finally, there is a discussion on the best ways to develop and implement an investment strategy in today's low interest rate environment.

Choice of Entrée:

Prime Ribs of Beef au Jus _____

Fazio Farms Breast of Chicken Romana Filled with Prosciutto di Parma, House Made Mozzarella, and Fresh Basil _____

Porcini Dusted Fillet of Sea Bass with a Teriyaki Reduction and Shallot Beurre Blanc _____

Total Selections: _____

HVEPC Member Name: _____

Guest Name: _____

[] Check if guest fee waiver is requested for prospective member.

**Send this portion along with your payment by April 6, 2013 to:
Albert DeLorenzo, Treasurer 276 Route 17K, Newburgh, NY 12550**