SPRING

2023 PROFESSIONAL ADVISORS BREAKFAST

Thursday, May 11 2023 8:00 - 11:00AM
Powelton Club Newburgh, NY

EDUCATION SESSION PRESENTED BY

Bryan Clontz, PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, ChSNC®, Charitable Solutions, LLC Founder/ President

With Opening Speaker: LENA S. RIZKALLAH, JD, CRPC®, Financial Advisor, Conte Wealth Advisors

REGISTRATION

$75 / $50 for members of: Hudson Valley Estate Planning Council* (includes breakfast)

register at:

communityfoundationshv.org/events

or call

845-452-3077

Check-In & Networking @ 8:00

Program 8:30-11:00AM

*Not a HVEPC member and would like to join? Apply at HVEPC.org

Course content is appropriate for newly admitted and experienced attorneys and CPAs. For information email info@communityfoundationshv.org or call 845-452-3077

7 DEADLY SINS OF PROFESSIONAL ADVISORS: ARE THEY TRYING TO DRIVE ME NUTS?

As professional advisors are more involved with high net worth comprehensive planning, many are directly or indirectly involved with charitable planning. After more than 25 years of working with advisors in this space, seven key common planning mistakes have emerged. Attendees for this interactive session will learn about the following charitable planning weaknesses:

1. Many advisors aren't raising the charitable question in the right way at the right time.
2. Many advisors presume all clients want to accumulate wealth for generations.
3. Many advisors don't run the numbers.
4. Many advisors frequently let the tax tail wag the dog.
5. Many advisors are not engaging with the charitable beneficiaries as part of the planning process.
6. Many advisors make things too complicated.
7. Many advisors aren't looking far enough across the balance sheet for assets other than cash.

This session will include research, tools and case studies for each of the respective gaps, and as a result, attendees will be more confident when developing and executing charitable plans.

This course qualifies for the following credit hours:

2 CPE, 2 CLE (pending)

HOSTED BY

Community Foundations of the Hudson Valley

Hudson Valley Estate Planning Council

Community Foundation of Orange and Sullivan

WBASNY

Foundation for Accounting Education FAE NYSSCPA