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ESTATE PLANNING DAY

*It's never too late to plan.
Learn the best techniques and have your
questions answered by renowned experts in
the estate planning field.*

**Sponsored by the Hudson Valley
Estate Planning Council (NAEPC Affiliate)**

Saturday, October 24, 2026

Student Union at the
SUNY New Paltz
1 Hawk Drive
New Paltz, NY 12561

ESTATE PLANNING DAY SPONSORSHIPS

Blustein, Shapiro, Rich & Barone, LLP

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Ulster Savings Bank

United Way of the Dutchess-Orange
Region

REGISTRATION

Saturday, October 24, 2026
7:30am - 2:00pm

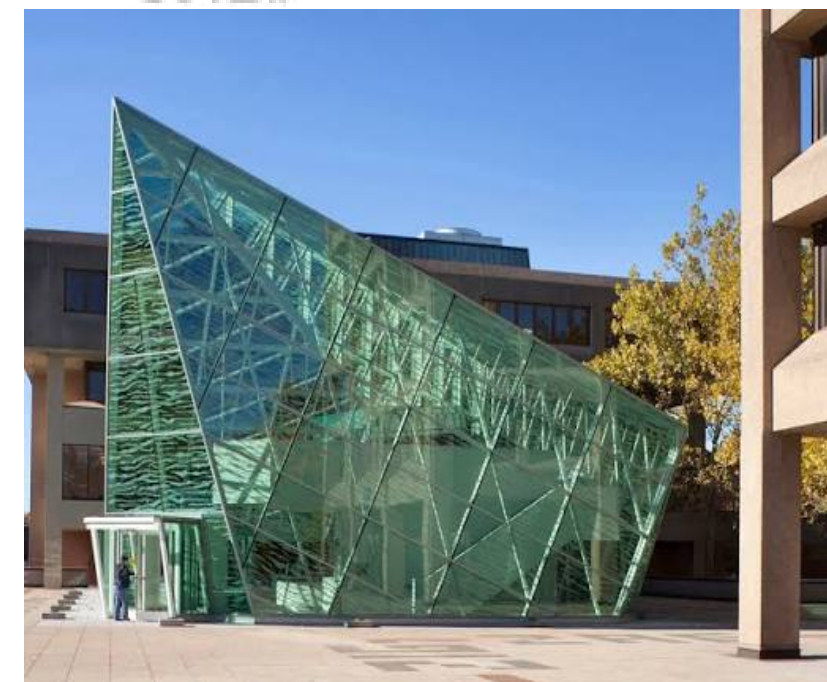
Register online:
www.EstatePlanningDay.com

www.hvepc.org

Or scan the QR code:



***Reserve early
Seating is limited!***



AGENDA

8:00am -1:30pm
REGISTRATION & CONTINENTAL
BREAKFASTFOLLOWED BY SESSIONS

ESSENTIAL ESTATE PLANNING TOOLS:
WILLS, REVOCABLE TRUSTS, POWERS OF
ATTORNEY, ADVANCED HEALTH CARE DIRECTIVES
Anthony G. Di Maria, Esq.
Corliss Law Group, P.C.

STRATEGIES TO MAXIMIZE SOCIAL SECURITY BENEFITS
Ash Ahluwalia, CFP®, MBA
Prosperity Capital Advisors

Rethinking Retirement
Andi Simon, PhD
Simon Associates Management Consultants

PANEL DISCUSSION ON CHARITABLE GIVING
Sally J. Cross, CFRE, Philanthropic Advisor
SJ Cross Consulting

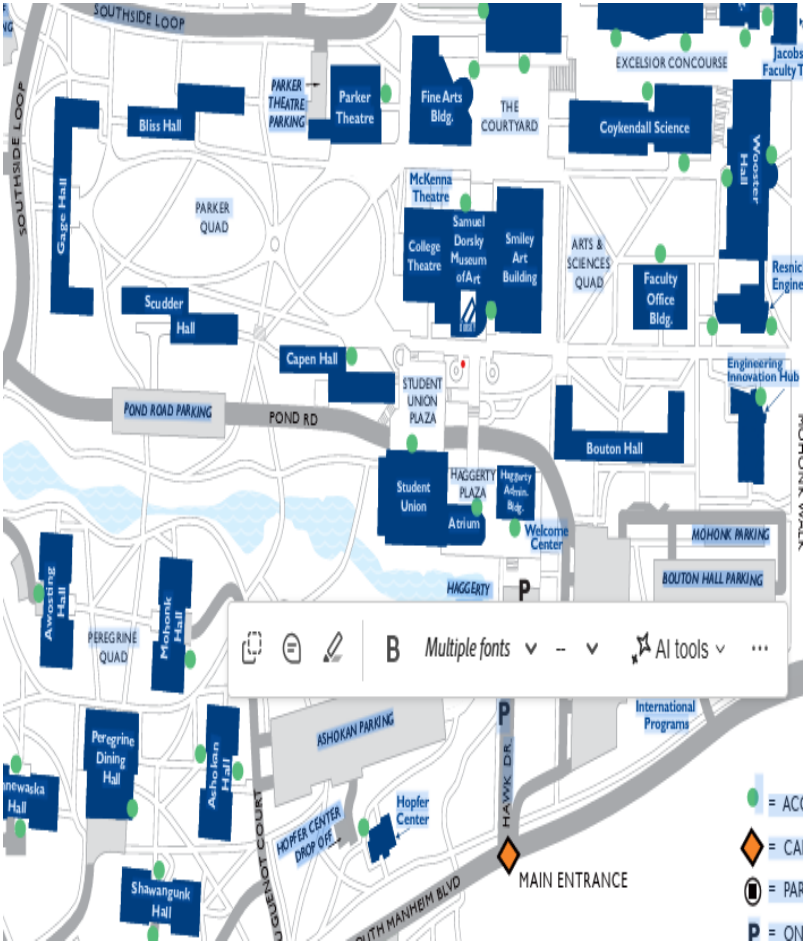
Elizabeth Rowley, CFRE, President & CEO Community
Foundation of Orange and Sullivan

Anne Marie Schoonhoven
United Way of the Dutches - Orange Region

Serena Marrero, Vice President, Philanthropy
Community Foundations of the Hudson Valley

YOUR HOME OR THE NURSING HOME? A LONG-TERM
CARE AND MEDICAID PLANNING UPDATE
Lou Pierro Esq.
Pierro, Connor & Strauss, LLC

FOLLOWED BY LUNCH



Estate Planning Day Participants:

\$20 Admission Includes:

- A bound program guide
- Continental breakfast, lunch, and refreshments
- Convenient free parking

Free admission to Active and Retired
Military and First Responders

Hudson Valley Estate Planning Council

The Hudson Valley Estate Planning Council is an association of estate planning professionals: Attorneys, Accountants, Trust Officers, Financial Planners, Investment Managers, Insurance Agents, and Planned Giving Professionals. The Council’s purpose is to provide educational opportunities for both its members and the general public regarding the full range of available estate planning techniques.

ESTATE PLANNING DAY COMMITTEE

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Heather Oboda, CPA, MBA
Citrin Cooperman
Sally J. Cross, CFRE, Philanthropic Advisor
SJ Cross Consulting

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