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OCT.
26

2019 ESTATE PLANNING DAY

PRESENTED BY
HUDSON VALLEY ESTATE PLANNING COUNCIL

SATURDAY OCT. 26, 2019

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

LOCATION

The Henry A. Wallace Center at the FDR Presidential Library and Home in Hyde Park, New York.

PARTICIPANT PACKAGE

\$20 Per Person Includes:

A bound program guide with information from experienced Hudson Valley Estate Planning Professionals.

Continental breakfast, lunch, and refreshments.

A free self-guided tour of the FDR Presidential Library.

Convenient free parking.

8:00 – 8:45

REGISTRATION AND CONTINENTAL BREAKFAST

8:45 – 9:00

WELCOME & INTRODUCTIONS

Hudson Valley Estate Planning Council
National Association of Estate Planners and Councils

9:00 – 9:35

ESSENTIAL ESTATE PLANNING TOOLS: WILLS, POWERS OF ATTORNEY, ADVANCED HEALTHCARE DIRECTIVES

Anthony G. Di Maria, Esq.
Dolgetta Law, PLLC

9:35 – 10:10

WELCOME TO THE SOCIAL SIDE OF RETIREMENTSM

Michael Pine, President
Pine Innovative Planning

10:10 – 10:45

PLANNING FOR LONG TERM CARE

Rick Stewart, CLTC[®]
Director, LTC Solution Center
Crump Life Insurance Services

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10:45 – 11:15

NETWORKING BREAK

11:15 – 11:50

PANEL DISCUSSION ON CHARITABLE GIVING

Sally Cross, CFRE, Vice President, Philanthropy
Community Foundations of the Hudson Valley

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

Maureen Brennan Lashlee, Executive Director
Habitat for Humanity of Dutchess County



11:50 – 12:25

SNOWBIRD PLANNING & CONSIDERATIONS

Adam M. Grenker, Esq.
Fox Rothschild LLP

12:25 – 1:00

MEDICARE AND MEDICAID PLANNING

Louis W. Pierro, Esq.
Pierro, Connor & Strauss, LLC

1:00 – 1:15

CONCLUDING REMARKS

1:15 – 2:00

LUNCH

HVEPC

The Hudson Valley Estate Planning Council is an association of estate planning professionals – attorneys, accountants, trust officers, financial planners, life underwriters, and planned giving professionals. The Council's purpose is to provide educational opportunities for both its members and the public regarding the full range of estate planning techniques.