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# ESTATE PLANNING DAY

*It's never too late to plan.  
Learn the best techniques from renowned  
experts in the estate planning field.*

Sponsored by the  
**Hudson Valley Estate Planning Council**  
in cooperation with **Marist College**

**Saturday, October 24, 2015**

**MARIST**  
Student Center  
3399 North Road  
Poughkeepsie, NY 12601

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## REGISTRATION

### ESTATE PLANNING DAY

**Saturday, October 24, 2015**

### Registration is easy:

Register online at <http://www.hvepc.org>

### Or register by mail:

Please reserve \_\_\_\_ spaces @\$20.00 per/person

Total Enclosed: \$ \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

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

Phone \_\_\_\_\_

Email \_\_\_\_\_

### Please make checks payable to:

Hudson Valley Estate Planning Council

### Send to:

Hudson Valley Estate Planning Council

c/o DeLorenzo Financial Planning Associates

276 Route 17K

Newburgh, NY 12550

### For more information call:

Celeste at 845-564-3654,

DeLorenzo Financial Planning Associates.

Reserve early – seating is limited.

# AGENDA

**8:00 – 8:45**

**Registration & Continental Breakfast**

**8:45**

**Welcome & introductions**

**Stefanie A. Sovak, Esq.**

*President, HVEPC  
Law Offices of Stefanie A. Sovak  
Cornwall on Hudson, NY*

**Chris DelGiorno**

*Vice President for College Advancement  
Marist College*

**National Association of Estate Planners and Councils**

## **Presentations**

**9:00-9:30**

**Estate planning with Retirement Assets - Pensions, IRAs, etc.**

*Bruce Steiner, Esq., of Counsel  
Kleinberg, Kaplan, Wolff & Cohen, P.C.*

**9:30-10:00**

**Estate Planning with Philanthropy / Charitable Wishes**

*Chris DelGiorno  
Vice President for College Advancement, Marist College*

**10:00-10:30**

**Life Insurance as Part of Estate Planning**

*Erin Ardleigh  
President, Dynama Insurance*

**Break 10:30 -10:45**

**10:45-11:15**

**Social Security Planning**

*Benjamin Lehrhoff  
Vice President, Bernstein Global Wealth Management*

**11:15-11:45**

**Medicare and Medicaid Planning**

*Bernard A. Krooks, J.D., CPA, LLM (in taxation), CELA,  
AEP (Distinguished)  
Partner, Littman Krooks, LLP*

**11:45-12:15**

**Estates and Trusts**

*Blanche Lark Christerson  
Managing Director, Deutsche Bank Trust Company, N.A.*

**Concluding Remarks**

## **Lunch**

**Served in the Student Center's Hudson Riverview Rooms across from the Nelly Goletti Theatre**

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

- *A bound guide with information from experienced Hudson Valley estate planners to act as a reference*
- *Continental Breakfast at Registration*
- *Refreshments during Break*
- *Lunch*
- *Convenient Free Parking  
( Use South Entrance to Marist College campus)*

## **Hudson Valley Estate Planning Council**

*The Hudson Valley Estate Planning Council is an association of estate planning professionals – attorneys, accountants, trust representatives, 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.*

## **ESTATE PLANNING DAY COMMITTEE**

### **Co-Chairs:**

*Mellany Bagtas, CRPC®, CFP®  
Merrill Lynch Wealth Management*

*Eileen V. Osterby, Vice President/Trust Officer  
Orange County Trust Company*

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#### **Logistics**

*Stefanie A. Sovak, Esq.,  
Law Offices of Stefanie A. Sovak*

#### **Program**

*Ita Rahilly, CPA, AEP, Partner  
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*Albert J. DeLorenzo Jr., CFP, AEP  
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