## **Hudson Valley Estate Planning Council Board of Directors**

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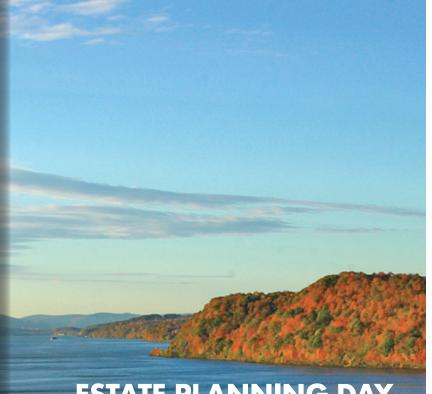
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Law Office of Stefanie A. Sovak



## **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)** Presented in cooperation with Marist College

Saturday, October 14, 2017

# MARIST

**Student Center** 3399 North Road • Nelly Goletti Theatre Poughkeepsie, NY 12601

## **ESTATE PLANNING DAY SPONSORSHIPS**

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Westchester Talk Radio, produced by SHARC Creative

## **REGISTRATION**

## **ESTATE PLANNING DAY**

Saturday, October 14, 2017

#### Registration is easy:

Register online at:

http://www.hvepc.org

## Registration by mail:

Please reserve spaces @ \$20.00 per/perso
Total Enclosed: \$
Name:
Address:
City/State/Zip
Phone:
Facili

## Please make checks payable to:

Hudson Valley Estate Planning Council

#### Send to:

**Hudson Valley Estate Planning Council** c/o Stewart P. Glenn, Esq., AEP Glenn & Breheney, PLLC, Attorneys 372 S Plank Road - Suite 2 Newburgh, NY 12550

#### For more information call:

Jeanne Reese or Sue DeLorenzo at 845-564-3654, DeLorenzo Financial Planning Associates.

Reserve early – seating is limited.

## **AGENDA**

8:00 - 8:45

**REGISTRATION – NELLY GOLETTI THEATRE** 

8:45 - 9:00

**WELCOME & INTRODUCTIONS** 

Hudson Valley Estate Planning Council

Marist College

National Association of Estate Planners and Councils

9:00 - 9:35

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

Anthony G. DiMaria, Esq. Dolgetta Law, PLLC

9:35 - 10:10

**CYBER SECURITY AND ESTATE PLANNING** 

Frazer Rice

Wilmington Trust

10:10 - 10:45

**IRAS & ANNUITIES IN ESTATE PLANNING** 

Bruce L. Birnbaum, J.D., LL.M., CLTC Birnbaum Advisory,

Multidisciplinary Wealth Strategies

10:45 - 11:10

**BREAK** 

11:10 - 11:45

PLANNED GIVING AS PART OF AN EFFECTIVE ESTATE PLAN

Joan Gasparovic Gambeski Director of Gift and Legacy Planning Marist College 11:45 - 12:15

**SNOWBIRD PLANNING & CONSIDERATIONS** 

Adam M. Grenker, Esq. Fox Rothschild, LLP

12:15 - 12:50

MEDICARE AND MEDICAID PLANNING

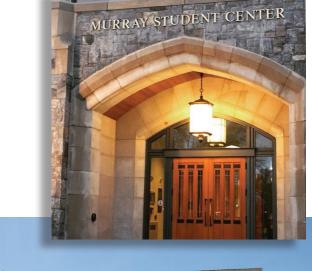
Louis W. Pierro, Esq.

Pierro, Connor & Associates, LLC

12:50 - 1:10

**CONCLUDING REMARKS** 

1:15 - 2:00 LUNCH



## **Estate Planning Day Participants Recieve:**

#### \$20 Per Person Includes:

- A bound guide with information from experienced Hudson Valley estate planners to act as a reference.
- Lunch and refreshments during registration and breaks
- Convenient Free Parking.

## **Hudson Valley Estate Planning Council**

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.

# Co-Chairs:

John P. Genn III, Senior Trust Officer, CTFA, AEP Tompkins Trust Company

**ESTATE PLANNING DAY COMMITTEE** 

Stewart P. Glenn, Esq., AEP Glenn & Breheney, PLLC

#### **Committee Chairs:**

## Logistics

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

#### Program

Ita Rahilly, CPA, AEP *RBT, LLP* 

## Registration

Albert J. DeLorenzo Jr., CFP, AEP

DeLorenzo Financial Planning Associates

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