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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)
Presented in cooperation with Marist College

Saturday, October 14, 2017

MARIST

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

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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/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 Stewart P. Glenn, Esq., AEP
Glenn & Breheny, 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 Receive:

\$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.

ESTATE PLANNING DAY COMMITTEE

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Tompkins Trust Company

Stewart P. Glenn, Esq., AEP

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