

 **Estate Planning Council of Long Island, Inc.**

**P.O. Box 338**

**Massapequa Park, New York 11762**

 **(516) 826-5982** [**www.epclongisland.org**](http://www.epclongisland.org)

Join us for Breakfast and a Seminar…

**“Protection of Estate Assets in the Digital World: Cybersecurity Threats, Safeguards and Opportunities for Estate Planners.”**

**Our speaker is Kenneth N. Rashbaum, Partner and Head of Privacy, Cybersecurity and Technology Transactions Practice Group, Barton, LLP.**

**Adjunct Professor of Law, Fordham Law School**

**Date: Thursday, December 21, 2023**

**Time: 8:30 am**

**Encore Luxury Living**

**300 Jericho Tpke., Jericho, NY 11752**

No Charge for Members in Good Standing

Guest of Member ($30.00)

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**2023/2024 Meeting Schedule – Please Mark Your Calendars**

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| Dinner Meetings | Breakfast Meetings |
| Thursday, January 18, 2024 – TBA- William P. LaPiana, Esq.- New York Law School- Venue TBA | Thursday, February 15, 2024 - Fiduciary Accounting Panel- Richard G. Chalifoux, J.D. AEP®. Joseph T. La Ferlita, Esq.- Rivkin Radler, LLP and Lisa Rispoli, CPA, AEP®- Grassi-Venue TBA   |
| Thursday, March 21, 2023- “Diversity” Presentation- Martin M. Shenkman, CPA, MBA, PFS, AEP (distinguished), JD- Venue TBA | Thursday, April 18, 2024- “Surrogates’ Update”- Nassau and Suffolk County Surrogates- Venue TBA |
| Tuesday, May 21, 2024- Annual Officers’ Conferment Dinner-The Crescent Beach Club- Bayville, NY |  |

**PLEASE NOTE:**

**Estate Planning Council of Long Island, Inc. (the “Council”) is endeavoring to qualify the featured presentations at its monthly meetings for CPE/CLE/CE/PACE credits to offer its members the opportunity to obtain professional educational credits as an additional benefit for attending.**

**Please be advised, however, that:**

**1.       Due to the specific qualification requirements for certain credits, each meeting may not qualify for every credit due to reasons beyond the control of the Council; and**

**2.       A particular presentation’s qualification for such credits will be determined after the meeting by third party sponsors.**

**Accordingly, while the Council shall use its best efforts to attempt to qualify each presentation for the professional educational credits listed above, a qualification cannot be guaranteed.**

**If seeking credit, please note:**

**a. Late-comers and early-leavers will not qualify to receive CE credit for their discipline(s).**

**b. To receive CE credit for your discipline(s), you must submit the evaluation sheet after the meeting, but before you leave, as evidence that you were present for the entire presentation. Be sure to print your name at the bottom of the evaluation.**

**c. Guests are not eligible to receive CE credit.**

**d. The speaker's outline will be available on the website two or more days before the meeting.**

**Farrell Fritz, PC- CLE provider number 0805**

**1 Credit in the area of Cyber Security.**

**This course is intended for experienced attorneys only.**

**Learning Objective: The time when estate planners only had to work with land, personal property, bank accounts and nervous families is long past –except for the nervousness part.  Much, if not most, of the financial assets of an estate are accessible online and therein, as the Bard famously wrote, lies** **the “rub.” The information estate planners work with in 2023 is increasingly sent, shared and stored online and that makes if highly vulnerable to cyber-attack. Planners have ethical and often fiduciary requirements to safeguard these assets, but how do you do so and where do you start if your only science or math degree is a B.A. in Political Science from your undergraduate university?  This presentation will explain how to protect digital estate asset information in a common-sense, cost-efficient way that mitigates risk, meets ethical and professional standards, and can put your clients at least somewhat at ease about your stewardship of their financial information.**

Prerequisite: None

Level of Knowledge: Intermediate

Teaching Method: Live

Recommended CPE credit: 1 credit in the Advisory Services area.

New York State Sponsor Identification Number: 002917

Advanced Preparation: None

Cordially,

Peter Manzi, CFP®, CEPA

Alison Gladowsky, Esq.

Co-Vice Presidents, Speakers’ Committee Chairpeople

**This presentation receives one (1) credit. If requesting Continuing Education credit, please check all applicable disciplines.**

**\_\_\_\_CLE \_\_\_\_ CPE \_\_\_\_ PACE \_\_\_\_ CTFA/AEP**

**You MUST return the evaluation forms no later than the close of business on**

**Monday, December 27, 2023, to be eligible for**

**CE credit.**

Estate Planning Council of Long Island, Inc.

PO Box 338, Massapequa Park, NY 11762

Phone/Fax: (516) 826-5982 E-mail: zaloney@hotmail.com

[] I will attend the Thursday, December 21, 2023, meeting.

[] I will bring a guest(s). ($30.00 per person)

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PLEASE PRINT MEMBER NAME PLEASE PRINT GUEST NAME

**\*\*If you do not pre-register you MAY NOT get the CE credit\*\***

**Visit** [**www.epclongisland.org**](http://www.epclongisland.org)

**Visit www.naepc.org.**

**Kindly return your reservation as soon as possible together with the appropriate guest fee for your guest. We must guarantee the number of people attending the meeting. Therefore, it is necessary to respond by Monday, December 18, 2023, either in writing, e-mail, telephone, or fax. We may be unable to accommodate you and your guest if your response is untimely. If, after making a reservation, you find that you and/or your guest are unable to attend, please contact us to cancel your reservation.**