



ESTATE
PLANNING
COUNCIL



DECEMBER 2024

NEWSLETTER



JOIN US FOR OUR BREAKFAST MEETING “Charitable Giving”

Our speaker is **Audra Lewton**,
Director of Planned Giving at New York Trust

Date: Thursday, December 19, 2024

Time: 8:30am–10:00am

Location: The Bristal of Jericho
310 Jericho Turnpike Jericho, New York 11753

No Charge for Members in Good Standing, Guest: \$30.00

Learning Objective: This session will focus on a variety of charitable giving strategies, with an emphasis on how you can help your charitably-minded clients make a bigger impact on the causes they care about and wish to support, whether during their lifetime or through their estate. We will discuss using appreciated property and retirement assets in charitable planning and will explore the benefits that charitable remainder trusts and community foundations can provide. The goal is to help sharpen the tools at your disposal for advising clients on the array of opportunities for tax-smart charitable giving.

Rivkin Radler, LLP- NYS CLE Accredited Provider
1 Credit in the Advisory Services area
This course is intended for experienced attorneys only.

[CLICK TO RSVP ONLINE](#)

Please RSVP no later than the end of
business on Monday, December 16th

WE WELCOME NEW MEMBERS TO THE COUNCIL

[MEMBER PORTAL](#)

Our council continues to expand our membership with new professionals. Please invite a colleague or acquaintance in the estate planning community as a guest to one of our meetings.

MEMBERS IN THE NEWS

[CONTACT US](#)

The Council would be proud to feature you in a future newsletter. Do you have news to share or have you authored an article? Contact zaloney@hotmail.com.

Check out the NAEPC website for many resources for our council and our members, including their monthly Journal of Estate and Tax Planning.

[VISIT NAEPC SITE](#)



PHOTOS FROM OUR PRIOR MEETING



Thank you to our featured speaker **Andrew Reinhart** for an insightful and entertaining program at the council's November 21st dinner meeting at Blackstone Steakhouse in Melville, NY.







DECEMBER 2024

UPCOMING EVENTS

PLEASE MARK YOUR CALENDARS

 Breakfast Meeting

 Dinner Meeting

 Study Group

DEC 17

Tuesday, 12/17/24

"101 Tax Savings Ideas"

Julie A. Welch, CPA/PFS, CFP®, AEP®
Study Group Webinar: 5:30pm - 6:30pm

DEC 19

Thursday, 12/19/24

"Charitable Giving"

Audra Lewton, Director of Planned Giving at New York Trust
Venue: The Bristal of Jericho, Jericho, NY
Breakfast Meeting: 8:30am - 10:00am

JAN 23

Thursday, 1/23/25

"Post Mortem Tax Planning"

Brian Conboy, TO & Elisa Pickel, Esq. -Fiduciary Trust Company International
Venue: Volpe at Fox Hollow, Woodbury, NY
Dinner Meeting: 5:30pm - 8:00pm

FEB 13

Thursday, 2/13/25

"Estate Planning for Loved Ones with Substance Abuse Problems"

Panel moderated by Patricia C. Marcin, Esq. -Rivkin Radler
Venue: TBA
Breakfast Meeting: 8:30am - 10:00am

MAR 20

Thursday, 3/20/25

"Planning for Foreign Clients"

Avi Kestenbaum, Esq. -Meltzer, Lippe, Goldstein & Breitstone, LLP
Venue: Volpe at Fox Hollow, Woodbury, NY
Dinner Meeting: 5:30pm - 8:00pm

APR 24

Thursday, 4/24/25

"Surrogates' Update"

Surrogates Hon. Vincent J. Messina, Jr. & Hon. Margaret C. Reilly
Venue: TBA
Breakfast Meeting: 8:30am - 10:00am

JUN 3

Tuesday, 6/3/25

Annual Officers' Conferment Dinner

Venue: The Crescent Beach Club, Bayville, NY
Dinner Meeting: 5:30pm - 8:00pm

OCT 19

Sunday, 12/19/25

NATIONAL EVENT:

62nd Annual NAEPC Advanced Estate Planning Strategies Conference

Want to learn more about the council's upcoming events?
Check out our Events Page.

EVENTS PAGE



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A SPECIAL THANK YOU TO OUR COUNCIL'S SPONSORS

Our sponsors provide tremendous financial support to the council, allowing us to maintain the cost of dues without an increase for nearly 10 years. They support the estate planning profession with advice, products, and services that benefit our clients. Please keep them in mind when you have a need.

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JOSEPH LA FERLITA
Partner, [Rivkin Radler](#)

TELL US ABOUT RIVKIN RADLER

Through six offices and 250 lawyers, Rivkin Radler is consistently *Driven to Deliver*® focused and effective legal services. We're committed to our best practices, requirements that go beyond professional and ethical standards. Our work product is clear and delivered on time. As a result, our clients proceed with confidence.

TELL US ABOUT YOU AND YOUR ROLE

Joseph La Ferlita practices trusts and estates law, with an emphasis on estate planning, estate and trust administration, and tax controversy. He counsels individual planning clients, beneficiaries, individual and corporate fiduciaries and not-for-profit entities, including public charities and private foundations in connection with a multitude of estate- and trust-related matters in the Surrogate's Court and the United States Tax Court.

WOULD YOU LIKE TO SHARE SOMETHING PERSONAL ABOUT YOURSELF?

In a former life, Joseph was a high school teacher for three years. Then and now, his goal has been to take time to explain sometimes complicated matters into "plain English."

Contact Joseph at Joseph.LaFerlita@rivkin.com

Interested in becoming a Sponsor for 2024-25? Visit our Sponsor Form for more information or email zaloney@hotmail.com.

SPONSOR FORM



DECEMBER 2024

COUNCIL LEADERSHIP

We thank our officers, board members, committee chairs, and participants for their commitment and leadership on behalf of our council and for the benefit of our members. If you are interested in sharing your time and talents, please consider joining a committee.

[VIEW OUR COMMITTEES](#)



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This newsletter was designed for the Estate Planning Council of Long Island by Steve Danziger
Contact s1danziger@gmail.com for inquiries