

**The Estate Planning Council of Nassau County, Inc.**

**P.O. Box 338**

**Massapequa Park, New York 11762**

**(516) 826-5982**

[**www.epcnassau.org**](http://www.epcnassau.org)

Join us for Breakfast and a Seminar…

**“U.S. 2023 Outlook and Economic Overview”**

**Our Speaker is Charles Luke,** **CFA,**

**Managing Director, Co-Director, Fixed Income**

**City National Rochdale**

## Our Moderator is Elisa Pickel, Esq., Managing Director, Trust Counsel - Estate Settlement at

## Fiduciary Trust International

**Date: Thursday, February 16, 2023**

**8:30 a.m.**

**ZOOM Program 9:00 a.m.**

**Encore Luxury Living**

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

**or ZOOM for those who are unable to attend in person**

**(ZOOM link to follow)**

**This program is a “camera on” meeting to confirm attendance of virtual participants.**

No Charge for Members in Good Standing

Guest of Member ($30.00)

**We would like to thank our Platinum Sponsors:**

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

|  |  |
| --- | --- |
| Dinner Meetings | Breakfast Meeting |
| Thursday, March 7, 2023- **JOINT MEETING with Suffolk County EPC -** “What the Cool Kids are Doing in Estate Planning”- Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished)- Volpe at Fox Hollow | Thursday, April 20, 2023 “Nassau County Surrogate’s Court Spring 2023 Updates” –  Hon. Margaret C. Reilly - Encore Luxury Living |
| Tuesday, May 23, 2023- “Annual Dinner” - Crescent Beach Club, Bayville, NY |  |

**PLEASE NOTE:**

**The Estate Planning Council of Nassau County, Inc. (the “Council”) is endeavoring to qualify the featured presentations at its monthly meetings for CPE/CLE/CE/PACE credits in order 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, 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. In order 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 Areas of Professional Practice**

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

**Learning Objective**: **“The changing economy and markets have a considerable impact on estate planning. This presentation will provide a look at the underlying issues and key indicators that form the basis of our future expectations.”**

**Prerequisite: None**

**Level of Knowledge: Intermediate**

**Teaching Method: Live/Virtual**

**Recommended CPE credit: 1 credit in the** **Economics area.**

**New York State Sponsor Identification Number: 002917**

**Advanced Preparation: None**

**Cordially,**

**Peter Manzi, CFP®, CEPA**

**Vice President, Speakers’ Committee Chair**

**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 affirmation and evaluation forms no later than the close of business on**

**Monday, February 20, 2023 to be eligible for**

**CE credit.**

The Estate Planning Council of Nassau County, Inc.

PO Box 338, Massapequa Park, NY 11762

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

[] I will attend the Thursday, February 16, 2023 meeting.

[] I will attend the Thursday, February 16, 2023 meeting via ZOOM.

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

[] I am a member of the Estate Planning Council of Suffolk County and plan to attend as a guest.

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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.epcnassau.org**](http://www.epcnassau.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, February 13, 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.**