

 **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…

**“Practical Considerations of**

**Fiduciary Accountings”**

**Speakers:**

**Richard G. Chalifoux, J.D. AEP®- Webster Private Bank**

**Joseph T. La Ferlita, Esq.- Rivkin Radler, LLP**

**Lisa Rispoli, CPA, AEP®- Grassi**

**Date: Thursday, February 15, 2024**

**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)

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







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



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

|  |  |
| --- | --- |
| Dinner Meetings | Breakfast Meetings |
| Thursday, March 21, 2024- “Diversity” Presentation- Martin M. Shenkman, CPA, MBA, PFS, AEP (distinguished), JD- The Mansion at Oyster Bay- Woodbury, NY  | Thursday, April 25, 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, 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 mission and vision of NAEPC is the collaboration of multiple disciplines to meet the estate planning needs of clients at all stages of their lives.  This program will feature a panel discussion of an attorney, CPA and Trust Officer who will review the selection, role and responsibilities of a fiduciary, the types and structure of an informal accounting, the format of a judicial accounting, commission calculations,  the pertinent provisions of a properly drafted Release Agreement and the potential liability to a fiduciary for improper conduct.**

**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, February 19, 2024, 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, February 15, 2024, 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, February 12, 2024, 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.**