



The Estate Planning Council of Nassau County, Inc.

P.O. Box 338

Massapequa Park, New York 11762

(516) 826-5982

www.epcnassau.org

Join us for our March seminar on

Thursday, March 18, 2021

8:30 a.m. - 9:00 a.m. (Networking)

9:00 a.m. - 10:00 a.m. (PROGRAM)

10:00 a.m. - 10:30 a.m. (Q&A)

**“The Big Apple vs. The Florida Orange – Florida
Trust and Estate Issues for New York
Professionals”**

Our Speaker is Amy B. Beller, Esq.

Beller Smith, Attorneys at Law

Boca Raton, Florida

No Charge for Members in Good Standing.

No Charge for Guests who are interested in joining our Council.

**(If you intend to bring a guest, please email Lisa Maloney with his/her name
and email address at: zaloney@hotmail.com)**

We would like to thank our Sponsor:



2021 Meeting Schedule - Please Mark Your Calendars

April 22, 2021- “The New Powers of Attorney Statute” - Ellen G. Makofsky, Esq. CELA*- Sponsored by: Long Island Community Foundation

May 20, 2021- Panel Discussion: “Fiduciary Accountings and Protection of the Fiduciary – Who, What, Where, When, Why?” - Richard G. Chalifoux, J.D., AEP®, Joseph T. La Ferlita, Esq. and Lisa Rispoli, CPA, AEP®

June 16, 2021- TBA- Sponsored by: Long Island Community Foundation

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 and affirmation form as evidence that you were present for the entire presentation. Be sure to print your name at the bottom of both forms.

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 Practices.

This course is intended for experienced attorneys only.

Learning Objective: When it comes to trust and estate matters, in many respects Florida is as different from New York as an orange is to an apple. In this presentation, New York lawyers, accountants and related estate professionals will be provided with a fast-paced overview of the areas in which Florida trust and estate law and practice diverges from their own. Included in the discussion will be areas of concern to which New York professionals should be alert, such as homestead devise restrictions and trust accounting requirements. This presentation is a must for anyone whose practice may from time to time cross over the border of the Sunshine State, as well as those who simply want an overview of this interesting topic.

Prerequisite: None

Level of Knowledge: Intermediate

Teaching Method: Live

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

New York State Sponsor Identification Number: 002917

Advanced Preparation: None

.....
Cordially,

Elisa M. Pickel, Esq.- 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, March 22nd 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, March 18, 2021 ZOOM Meeting.

I will bring a guest(s).

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

PLEASE PRINT MEMBER NAME

PLEASE PRINT GUEST NAME

FOLLOW US ON:

LinkedIn:

<https://www.linkedin.com/company/estate-planning-council-inc-of-nassau-county/?viewAsMember=true>

Facebook:

https://www.facebook.com/EstatePlanningCouncilofNassauCounty/?ref=py_c