

 **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 Dinner and a Seminar…

**“Diversity, Equity, and Inclusion in**

**Estate and Financial Planning for**

**Religion and Chronic Illness”**

**Our speaker is Martin M. Shenkman, CPA, MBA, PFS, AEP (distinguished), JD-**

**Martin M. Shenkman, PC**

**Date: Thursday, March 21, 2024**

**Time: 5:00 p.m. - Cocktails**

**6:30 - 8:30 p.m. – Program (2 hours)**

**Volpe at Fox Hollow**

 **7725 Jericho Tpk., Woodbury, NY 11797**

No Charge for Members in Good Standing

Guest of Member ($75.00)

**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**

|  |  |  |
| --- | --- | --- |
| Breakfast Meeting | Dinner Meeting | Dinner Meetings |
| 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 | 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**

**2 Credits in the Areas of Diversity, Equity, and Inclusion**

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

**Religion Learning Objectives:**

1. **Inform attendees as to how religious considerations can be integrated into estate planning documents.**
2. **Sensitize practitioners to the importance of religious considerations and how they can discuss these personal and important issues with clients.**
3. **Teach how financial planning, investments, and other dimensions of a comprehensive estate plan can be modified to respect a client’s religious wishes.**

**Chronic Illness Learning Objectives:**

1. **Inform attendees as to how disability, chronic illness and other health considerations can be integrated into estate planning documents.**
2. **Sensitize practitioners to the importance of chronic illness considerations and how they can discuss these personal and important issues with clients.**
3. **Teach how financial planning, investments, and other dimensions of a comprehensive estate plan can be modified to address client and family member health challenges.**

**Prerequisite: None**

**Level of Knowledge: Intermediate**

**Teaching Method: Live**

**2 Credits Subject Area of Professional Ethics**

**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 two (2) credits. If requesting Continuing Education credit, please check all applicable disciplines.**

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

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PO Box 338, Massapequa Park, NY 11762

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

[] I will attend the Thursday, March 21, 2024, meeting.

[] I will bring a guest(s). ($75.00 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, March 18, 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.**