

**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 our breakfast and seminar …

**“Year-End Tax Planning Tips After Year 1 of TCJA”**

**Our Speaker is Neil D. Katz, Esq.- Katz Chwat, P.C.**

**Our Update Speaker is Alan E. Weiner, CPA, JD, LL.M.**

**“The Practical Aspects of Qualified Charitable Distributions From a Traditional Individual Retirement Account”.**

**Thursday, October 17, 2019**

8:30 am

**The Nassau County Bar Association**

**15th and West Streets, Mineola, NY 11501**

**516-747-4070**

No Charge for Members in Good Standing

Guest of Member ($30.00)

**We would like to thank our Sponsor:**



**2019/2020 Meeting Schedule – Please Mark Your Calendars**

|  |  |  |
| --- | --- | --- |
| Dinner Meetings | Breakfast Meetings |  |
| Thursday, November 21, 2019-Chateau Briand- TBA | Thursday, December 19, 2019- Westbury Manor- TBA |  |
| Thursday, January 16, 2020- Westbury Manor-TBA | Thursday, February 20, 2020- Nassau County Bar Association- TBA |  |
| Thursday, March 19, 2020- Chateau Briand- TBA | Thursday, April 23, 2020- Nassau County Bar Association- “Surrogate’s Update”-  Hon. Margaret C. Reilly |  |

**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**: **With year end quickly approaching and with one year of living with the Tax Cuts and Jobs Act behind us, the question as to what income estate tax planning opportunities still exist.  This discussion will focus on a number of options that are available before 12/31/19, including dealing with the itemized deduction limitations, planning for the qualified business income deduction, tax deferral opportunities and gift planning.**

**Prerequisite:** None

**Level of Knowledge**: Intermediate

**Teaching Method**: Live

**Recommended CPE credit**: 1 credit in the Taxation subject area.

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

**Advanced Preparation:** None

**This presentation receives one (1) credit. If requesting Continuing Education credit, please check all applicable disciplines.**

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

**\*\*If you do not pre-register you MAY NOT get the CE credit\*\***

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 **Tuesday, October 15, 2019**, either in writing, e-mail, telephone or fax. We may be unable to accommodate you and your guest for breakfast 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.

Cordially,

Sharon E. Pazienza, CTFA

Vice President- Speakers’ Committee Chair

**We request, whenever possible, that you RSVP on the Council’s website at** [**www.epcnassau.org**](http://www.epcnassau.org/)

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, October 17, 2019 meeting at the Bar Assoc.

[ ] I will NOT attend the Thursday, , October 17, 2019 meeting at the Bar Assoc.

[ ] 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. (30.00 per person)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PLEASE PRINT MEMBER NAME PLEASE PRINT GUEST NAME

**If your Guest applies for membership and is accepted prior to the November 21, 2019 Dinner meeting, the Guest fee will be credited against his/her 2019/2020 Membership dues.**