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**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 our Breakfast and Seminar…

**“Corporate Transparency Act”**

**Our speaker is Martin M. Shenkman, CPA, MBA, PFS, AEP, J.D.**

**Shenkman Law**

**Date: Thursday, October 10, 2024**

**Time: 8:30 am - 10:00am**

**Encore Luxury Living**

**300 Jericho Turnpike- Jericho, NY 11753**

No Charge for Members in Good Standing

Guest of Member ($75.00)

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

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**2024/2025 Meeting Schedule – Please Mark Your Calendars**

|  |  |
| --- | --- |
| **Dinner Meetings**  **5:30pm – 8:30pm** | **Breakfast Meetings**  **8:30am – 10am** |
| Thursday, November 21, 2024  *"Sunsetting of Estate Tax Exemption"*  Andrew Reinhart - Wells Fargo  Blackstone Steakhouse- Melville, NY | Thursday, December 19, 2024  *“Charitable Giving”*  Carrie Trowbridge- Long Island Community  TBA |
| Thursday, January 23, 2025  *"Post Mortem Tax Planning"*  Brian Conboy, TO & Elisa Pickel, Esq. Fiduciary Trust Company International  Volpe at Fox Hollow, Woodbury, NY | Thursday, February 13, 2025  *“Estate Planning for Loved Ones with Substance Abuse Problems”*  Panel moderated by Patricia C. Marcin, Esq.  Rivkin Radler  TBA |
| Thursday, March 20, 2025  *"Planning for Foreign Clients"*  Avi Kestenbaum, Esq., -Meltzer, Lippe, Goldstein & Breitstone, LLP  Volpe at Fox Hollow, Woodbury, NY | Thursday, April 24, 2025  *“Surrogates’ Update”*  Surrogates Hon. Vincent J. Messina, Jr. &  Hon. Margaret C. Reilly  Venue TBA |
| Tuesday, June 3, 2025  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.**

**Rivkin Radler, LLP- CLE provider**

**1 Credit in the Area of Professional Practice**

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

**Learning Objective: The learning objective is to take a “deeper dive” into what everyone practitioners might consider in dealing with the Corporate Transparency Act. We’ll start with a quick overview of the CTA (a brief review of terminology so that even if you have missed prior CTA programs you will be able to follow the discussions). How might professional firms adapt to dealing with the CTA? This will include notifying clients, modifying engagement agreements, update intake procedures, updating existing client documents, updating forms, understanding whether and when to handle CTA reporting. The just issued new FAQs will be discussed. We’ll have a detailed discussion about the practical issues Reporting Companies will face when Beneficial Owners do not want to provide required information. What leverage will Reporting Companies have? What can officers who might face liability do?**

**This program will delve deeper into dealing with the CTA and not just summarize the new rules.**

**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,**

**Alison Gladowsky, 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 evaluation forms no later than the close of business on Monday, October 14, 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, September 19. 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, October 7, 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.**