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 Kick-Off Dinner and a Seminar…

"How Generational Differences May Impact Estate Planning and Trust Administration"

Our speaker is Raymond C. Radigan,
Senior Managing Director, Regional Team Lead,
First Republic Trust Company

Date: Thursday, September 22, 2022
Time: 5:30 p.m. - Cocktails
6:30 - 8:00 p.m. - Program

Volpe at The Fox Hollow
or ZOOM for those who are unable to attend in person
(ZOOM link to follow)

No Charge for Members in Good Standing
Guest of Member ($75.00)

In accordance with the Council's By-Laws, Council membership dues must be paid prior to September 22, 2022. Members who attend the September meeting and have not paid their dues will be charged a $75.00 guest fee for the meeting, which includes a $25.00 non-refundable fee. Thus, $50.00 will be credited against the member's dues when paid.

We would like to thank our Platinum Sponsors:

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2022/2023 Meeting Schedule – Please Mark Your Calendars

Breakfast Meetings	Dinner Meetings
Thursday, October 20, 2022 - Encore Luxury Living- John Brady- BKA Private Wealth Consultants- "State of Life Insurance Market"	Thursday, November 10, 2022 - Jonathan G. Blattmachr Jr., Esq., Peak Trust Company and Martin M. Shenkman, CPA-TBA
Thursday, December 15, 2022 - Encore Luxury Living- Elizabeth Forspan, Esq. - "Medicaid and Elder Care"	Thursday, January 19, 2023 - TBA
Thursday, February 16, 2023 - Encore Luxury Living- TBA	Thursday, March 16, 2023 - TBA
Thursday, April 20, 2023 - Encore Luxury Living -TBA	

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: This presentation will focus on how the general traits and characteristics of each generation – from the Silent Generation to Generation Alpha – can have an impact on Estate Planning and Trust Administration. Each generation has lived through certain social issues and technological advances at the same life stage that could have impacted their beliefs, goals, expectations and needs. This presentation will also review

how certain modern social and technological trends could affect estate planning in current and future years.

Prerequisite: **None**

Level of Knowledge: Intermediate

Teaching Method: Live/Virtual

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
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, September 26, 2022 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, September 22, 2022 meeting.
[ ] I will attend the Thursday, September 22, 2022 meeting via ZOOM.
[ ] I will bring a guest(s). ($75.00 per person)
[ ] I am a member of the Estate Planning Council of Suffolk County and plan to attend as a guest. ($75.00 per person)

______________________________ ______________________________

PLEASE PRINT MEMBER NAME PLEASE PRINT GUEST NAME

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

Visit www.epcnassau.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, September 19, 2022, 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.