

 **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 Kick-Off Dinner and Seminar…

**"Powerful Trust Laws to Combat Future Uncertainties: The Need for Flexibility"**

**Our speaker is Al W. King, III J.D., LL.M, AEP, TEP- South Dakota Trust Company, LLC**

**Date: Thursday, September 19, 2024**

**Time: 5:30 p.m. - Cocktails**

**6:30 - 8:00 p.m. – Program**

**Volpe at The Fox Hollow**

**7725 Jericho Tpke.**

**Woodbury, NY 11797**

No Charge for Members in Good Standing

Guest of Member ($75.00)

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

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

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**In accordance with the Council’s By-Laws, Council membership dues must be paid prior to September 19, 2024. 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.**

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

|  |  |
| --- | --- |
| Breakfast Meetings | Dinner Meetings |
| Thursday, October 10, 2024- "Corporate Transparency Act"-Martin M. Shenkman, CPA, MBA, PFS, AEP, J.D.-Shenkman Law-Encore Luxury Living, Jericho, NY  | Thursday, November 21, 2024- "Sunsetting of Estate Tax Exemption"- Andrew Reinhart - Wells Fargo (introduced by Joann Berman)- Blackstone Steakhouse- Melville, NY |
| Thursday, December 19, 2024 – “Charitable Giving”- Patricia C Marcin, Esq. - Rivkin Radler LLP and Carrie Trowbridge- Long Island Community- TBA | Thursday, January 23, 2025-- "Post Mortem Tax Planning"-Brian Conboy, TO and Elisa Pickel, Esq. - Fiduciary Trust Company International- Volpe at Fox Hollow, Woodbury, NY |
| Thursday, February 13, 2025 - "MentalHealth in Estate Planning"- Speaker TBA--Venue 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:** **Flexible trust planning has never been more important as a result of tax, political, economic, lawsuit and family uncertainty. This presentation will discuss how modern directed trusts, investment management LLCs, trust protectors and special purpose entities can all provide a family with flexibility and control to deal with these uncertainties intergenerationally. The presentation will also discuss other important non-tax reasons for establishing trusts such as asset protection, privacy, promotion of family values, divorce protection, family governance, as well as the prevention of family disputes. Lastly, this presentation will discuss how easy and practical it is to add these benefits to newly drafted trusts or to reform and modify existing trusts. Many people frequently ask how soon they can get their assets out of trusts, while the modern trust structure has them asking how long they can leave their assets in a trust.**

**Prerequisite: None**

**Level of Knowledge: Intermediate**

**Teaching Method: Live**

**Recommended CPE credit: 1 credit in the** **Tax 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, September 23, 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, September 16, 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.**