ESTATE PLANNING DAY

It's never too late to plan.
Learn the best techniques and have your questions answered by renowned experts in the estate planning field.

Sponsored by the Hudson Valley Estate Planning Council (NAEPC Affiliate)

Saturday, October 26, 2024

The Henry A. Wallace Center at the
FDR Presidential Library and Home
4079 Albany Post Road
Hyde Park, NY 12538

ESTATE PLANNING DAY SPONSORSHIPS

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REGISTRATION

Saturday, October 26, 2024
8:00am - 2:00pm

Register online:
www.EstatePlanningDay.com

Or scan the QR code:

Reserve early
Seating is limited!

AGENDA

8:00 – 8:30
REGISTRATION & CONTINENTAL BREAKFAST

8:30 – 8:40
WELCOME & INTRODUCTIONS
Hudson Valley Estate Planning Council
National Association of Estate Planners and Councils

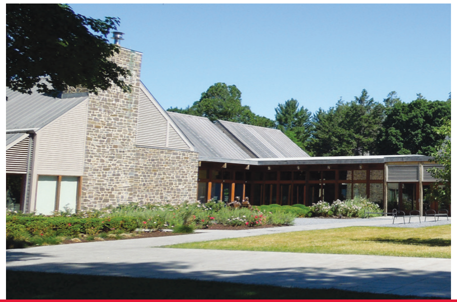
8:40 – 9:30
ESSENTIAL ESTATE PLANNING TOOLS: WILLS, REVOCABLE TRUSTS, POWERS OF ATTORNEY, ADVANCED HEALTH CARE DIRECTIVES
Anthony G. Di Maria, Esq.
Kurzman Eisenberg Corbin & Lever, LLP

9:30 – 10:20
STRATEGIES TO MAXIMIZE SOCIAL SECURITY BENEFITS
Ash Ahluwalia, CFP®, MBA
OneTeam Financial

10:20 – 10:30
NETWORKING BREAK

10:30 – 11:10
ELDER ABUSE & SENIOR SCAMS
Michael P. Enea, Esq.
Enea, Scanlan & Sirignano, LLP

11:10 – 11:35
NETWORKING BREAK



11:35 – 12:20
PANEL DISCUSSION ON CHARITABLE GIVING
Sally J. Cross, CFRE, Philanthropic Advisor
SJ Cross Consulting

Elizabeth Rowley, CFRE, President & CEO
Community Foundation of Orange and Sullivan

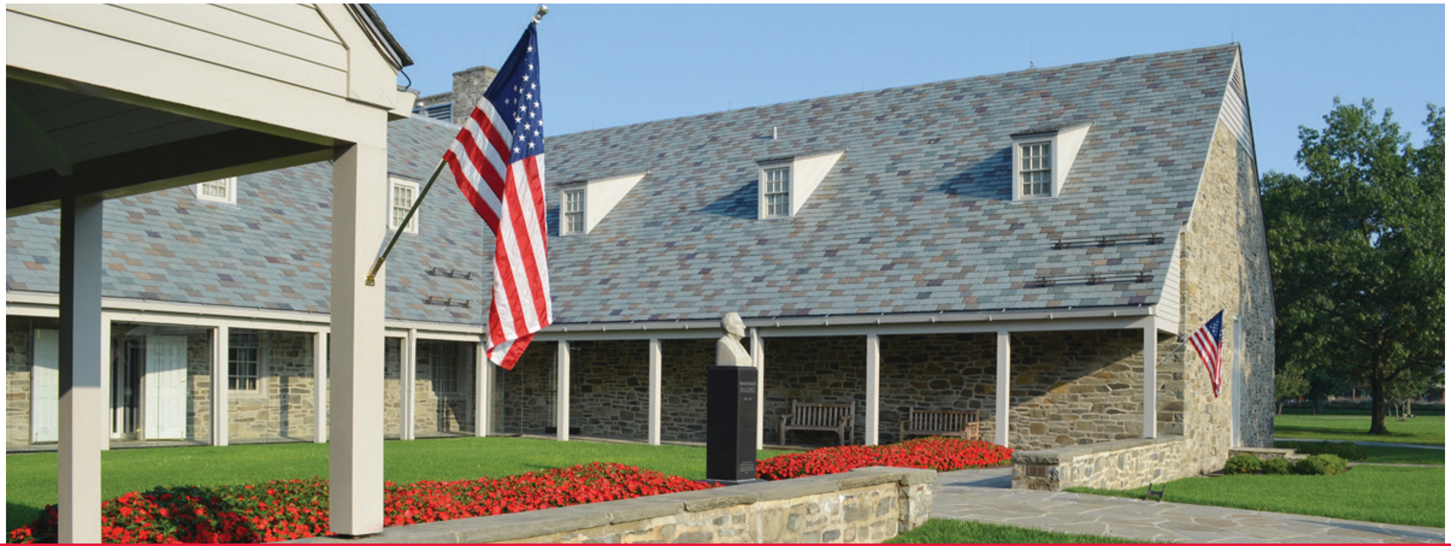
Lori Robertson, Executive Director
Walkway Over the Hudson

Serena Marrero, Vice President, Philanthropy
Community Foundations of the Hudson Valley

12:20 – 1:10
ASSET PROTECTION AND MEDICAID PLANNING
Brian L. Miller, Esq., CELA®
Littman Krooks LLP

1:10 – 1:15
CONCLUDING REMARKS

1:15 – 2:00
LUNCH



Estate Planning Day Participants:

$25 Admission Includes:

- A bound program guide
- Continental breakfast, lunch, and refreshments
- Convenient free parking
- A free self-guided tour of the FDR Presidential Library and Museum

Hudson Valley Estate Planning Council

The Hudson Valley Estate Planning Council is an association of estate planning professionals: Attorneys, Accountants, Trust Officers, Financial Planners, Investment Managers, Insurance Agents, and Planned Giving Professionals. The Council's purpose is to provide educational opportunities for both its members and the general public regarding the full range of available estate planning techniques.

ESTATE PLANNING DAY COMMITTEE

Co-Chairs:
Heather Oboda, CPA, MBA
Partner, Citrin Cooperman

Matthew J. Caruso, AIF, CFP, ChFC
President & CEO, WealthTrust

Committee Chairs:

Program
John P. Genn III, Vice President & Senior Trust Officer, CTFA, AEP
Tompkins Trust Company

Advertising
Matthew J. Caruso, AIF, CFP, ChFC
President & CEO, WealthTrust

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