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OCT.
26

2024 ESTATE PLANNING DAY

PRESENTED BY
HUDSON VALLEY ESTATE PLANNING COUNCIL

8:00 – 8:30

REGISTRATION AND 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 AND 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

SATURDAY

OCT. 26, 2024

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

LOCATION

The Henry A. Wallace Center
at the FDR Presidential Library
and Home in Hyde Park, New
York.

PARTICIPANT PACKAGE

\$25 Per Person Includes:
A bound program guide with
information from experienced
Hudson Valley Estate Planning
Professionals.

Continental breakfast, lunch, and
refreshments.

A free self-guided tour of the FDR
Presidential Library.

Convenient free parking.

PRELIMINARY AGENDA, PROGRAM SUBJECT TO CHANGE

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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, and planned giving professionals. The Council’s purpose is to provide educational opportunities for both its members and the public regarding the full range of estate planning techniques.

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 and 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