

2018

PRIVATE WEALTH & TAXATION INSTITUTE

Continuing Professional Education Series

PRESENTED BY

**MAURICE A. DEANE SCHOOL OF LAW
HOFSTRA UNIVERSITY**

AND

MELTZER, LIPPE, GOLDSTEIN & BREITSTONE, LLP

Day 1 - June 6, 2018

Day 2 - June 7, 2018

Sessions run from 8:30am – 5:30pm

Maurice A. Deane School of Law at Hofstra University

Registration: \$75 Per Person/Per Day (in advance/non-refundable)

\$100 Per Person/Per Day (at door)

(includes breakfast and lunch)

Limited seating. CLE/CPE Credit and Webinar available

Special Pricing for NCCPAP Members

Live program is transitional and appropriate for both experienced and newly admitted attorneys.

Webinar is non-transitional and appropriate for experienced attorneys only.

Financial Aid is available - for information please email sharris@meltzerlippe.com

RSVP by May 21, 2018
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PLEASE JOIN US FOR A NETWORKING COCKTAIL PARTY

SPONSORED BY STEP LONG ISLAND ON JUNE 6TH

5:30 – 7:30 PM LOCATED IN THE ATRIUM



WHO SHOULD ATTEND

Real Estate & Business Owners
Attorneys, CPAs
Financial Advisors

PROGRAMS HELD AT:

121 Hofstra University-Room 308
Hempstead, New York 11549
PLEASE SEE PAGE 19 FOR DIRECTIONS TO EVENT

2018

PRIVATE WEALTH & TAXATION INSTITUTE

Schedule

| WEDNESDAY, JUNE 6 | AM SESSION | 4.5 CLE/CPE |
|-------------------|------------|-------------|
|-------------------|------------|-------------|

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|---------------|--|
| 8:00 – 8:30 | Breakfast and Sign In |
| 8:30 – 8:45 | Introduction to Program <i>Stephen M. Breitstone</i> |
| 8:45 – 10:45 | Planning to Sell a Business – A Survey of Legal, Tax and Financial Considerations <i>Brad Dillon, David E. Kahen, and Andrea Parness – Moderated by Ira R. Halperin</i> |
| 10:45 – 11:00 | Break |
| 11:00 – 12:00 | Planning Nuggets in the Current Tax Environment <i>Martin M. Shenkman</i> |
| 12:00 – 1:00 | Divorce - Minimize the Impact & Maximize the Leverage: What Every Professional Advisor Should Know <i>Sharon L. Klein</i> |
| 1:00 – 2:00 | Lunch |

| WEDNESDAY, JUNE 6 | PM SESSION | 3.5 CLE/CPE |
|-------------------|------------|-------------|
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|-------------|--|
| 2:00 – 3:00 | UJA Federation of NY Bud Rosner Lecture Charitable Planning & Impact Under Tax Cuts and Jobs Act 2017 (Use of CRT, CLT, Charitable IRA's) <i>Sandy J. Schlesinger</i> |
| 3:00 – 4:00 | Know the Differences: All Charitable Deductions Are Not Equal. Planning Opportunities Involving the Charitable Deductions <i>Avi Z. Kestenbaum</i> |
| 4:00 – 4:15 | Break |
| 4:15 – 5:15 | Structuring Business Entities after Tax Cuts and Job Acts 2017 <i>Robert N. Brown, Stuart I. Odell and Mark E. Wilensky</i> |
| 5:30 – 7:30 | *****STEP Long Island Networking Cocktail Party***** <i>Atrium</i> |

Question and Answer period will follow each topic

2018

PRIVATE WEALTH & TAXATION INSTITUTE

Schedule (Continued)

THURSDAY, JUNE 7

AM SESSION

4.5 CLE/CPE

- 8:00 – 8:30 Breakfast and Sign In
- 8:30 – 8:45 Introduction to Program
Stephen M. Breitstone
- 8:45 – 9:45 Can You Increase Your After Tax Rewards from the Sale of a Business by Giving it to Charity?
Professor Jerome M. Hesch and Joy Spence
- 9:45 – 10:45 Will You Still Need Me, Will You Still Feed Me, When I'm Sixty-Four?
Elizabeth Valentin
- 10:45 – 11:00 Break
- 11:00 – 12:00 Planning to Protect Your Assets in a Dangerous World
Daniel S. Rubin
- 12:00 – 1:00 Can a Deferred Compensation Plan Enable a Section 199A Deduction Under TCJA2017?
Gerald P. Wolf
- 1:00 – 2:00 Lunch

THURSDAY, JUNE 7

PM SESSION

3.5 CLE/CPE
(1 in Ethics)

- 2:00 – 3:00 Practitioners Surrogate Court Panel – Will Contests: A Planners and Litigators Perspective
David A. Bamdad, Mary P. O'Reilly, Eric W. Penzer, Hon. Margaret C. Reilly
- 3:00 – 4:00 Integrated Planning for the Family Office with Freeze Partnerships
Todd A. Angkatavanich and Stephen M. Breitstone
- 4:00 – 4:15 Break
- 4:15 – 5:15 Ethics – Standing at the Edge of a Cliff – How to Advise a Client Proposing to Take a Tax Position That is Uncertain, Lacking in Authority or Illegal.
Prof. Alan I. Appel, Megan L. Brackney and Mark E. Wilensky

Questions and Answer period will follow each topic



*Please join us for
a Networking Cocktail Party
sponsored by STEP Long Island*

**Wednesday, June 6, 2018
(following the last afternoon session)**

***5:30 - 7:30 PM
Located in the Atrium***

PRIVATE WEALTH & TAXATION INSTITUTE FACULTY

DIRECTOR



Stephen M. Breitstone – is a partner and Chair of the Private Wealth & Taxation Group and Director of the Private Wealth & Taxation Institute, at Meltzer Lippe. The Private Wealth & Taxation Group includes both the Tax Group and Trust & Estates Group. Steve handles domestic and international, income estate and gift tax planning for high net worth individuals, closely held businesses and real estate owners; 1031 Exchanges, income taxation of corporate mergers and acquisitions; taxation of workouts and bankruptcies; federal, state and local tax procedure and controversies. Steve is on the advisory board of the New York Institute on Federal Taxation and a Fellow of the American College of Tax Counsel. *LL.M. Tax, NYU; J.D., Cardozo School of Law; Adjunct Professor at Cardozo School of Law.*

2018 FACULTY



Todd A. Angkatavanich – is a Principal in EY's National Tax Department, Private Client Services Group. He focuses on representing domestic and international families and family offices in structuring multigenerational wealth transfer, preservation and business succession vehicles, with an emphasis on navigating transfer tax pitfalls that often arise under Chapter 14 of the Code. Todd is an ACTEC Fellow and frequents speaker at conferences including the Heckerling Estate Planning Institute.



Robert N. Brown CPA, CGMA - Robert has spent more than 35 years in public practice serving small to middle market companies and individuals in the areas of tax preparation, tax planning, tax controversy, estate planning, multi-state taxation, tax representation, financial statement preparation and management advisory services. Mr. Brown currently serves as president of the Nassau Suffolk Chapter of the National Conference of CPA Practitioners. He is a member of the American Institute of Certified Public Accountants, the AICPA Private Companies Practice Section, the New York State Society of Certified Public Accountants, and the National Conference of CPA Practitioners.



Professor Alan I. Appel – is a professor at New York Law School. He specializes in international and domestic tax planning involving taxation of mergers and acquisitions, partnerships, joint ventures, limited liability companies and tax controversy matters. Prior to joining New York Law School, he spent 13 years in the New York office of Bryan Cave LLP. *LL.M., NYU, J.D., New York Law School.*



Brad Dillon – is a senior vice president and senior wealth planner in the New York office of Brown Brothers Harriman. Prior to joining BBH, he was in private legal practice in the trusts and estates department at Milbank, Tweed, Hadley & McCloy LLP, where he focused on estate, gift and generation-skipping transfer tax planning. Mr. Dillon is a frequent lecturer and writer, having published articles in several industry-leading outlets, including the NYSBA Law Journal, the Journal of Taxation, Trusts and Estates, and Leimberg. He is also a regular commentator in the print media and is regularly quoted on tax, trusts and estate matters on CNBC, Bloomberg, the Wall Street Journal, and other media outlets. Mr. Dillon received his LL.M. in taxation from the NYU School of Law, his J.D. from the UCLA School of Law and his B.A. from Indiana University.



David A. Bamdad – is an Associate in the Trusts & Estates Practice Group at Meltzer Lippe. David focuses his practice on estate and trust litigation. In his practice, he regularly counsels fiduciaries and beneficiaries in contested probate, administration and accounting proceedings, discovery and turnover proceedings, and proceedings to remove fiduciaries. *B.A., Binghamton University; J.D., Hofstra University.*



Ira R. Halperin – Ira heads the Corporate Law Group of Meltzer Lippe with extensive experience representing public and private companies engaged in complex mergers and acquisitions, public offerings, private placements, corporate financings, venture capital investments, restructurings and other commercial transactions. He has been selected as a “New York Super Lawyer” in the area of Business/Corporate and Mergers & Acquisitions. His merger and acquisition experience includes the representation of buyers, sellers, investors, boards of directors, audit committees and financial advisors in structuring, negotiating and completing complex purchases and sales of businesses and spinoffs of subsidiaries and divisions to shareholders. Ira also has substantial experience representing underwriters and U.S. and non-U.S. issuers in public and private offerings of equity securities including initial public offerings and preferred stock issuances, both investment-grade and high-yield debt, convertible securities and unit offerings. *B.A., Cornell University; M.D.A., Cornell University; J.D., Hofstra University., CPA.*



Megan L. Brackney – is a partner at Kostelanetz & Fink, LLP. Megan concentrates her practice in the areas of tax controversies, and civil and white collar criminal litigation. Ms. Brackney received her J.D. from the University of Kansas School of Law and her LL.M. in Taxation from New York University. Prior to joining Kostelanetz & Fink, LLP, Ms. Brackney was an Assistant United States Attorney for the Southern District of New York. Ms. Brackney is a member of the New York State Bar Association Tax Section's Executive Committee, a Fellow of the American College of Tax Counsel, a former Council Director for the American Bar Association Section of Taxation, and the former Chair of the Taxation Committee of the New York County Lawyers' Association.



Professor Jerome M. Hesch - serves as a Tax and Estate Planning Consultant for lawyers and estate planning professionals throughout the country and acts as Special Tax Counsel to Oshins & Associates in Las Vegas Nevada and Meltzer Lippe. He is the Director of the Notre Dame Tax and Estate Planning Institute, on the Tax Management Advisory Board, a member of the American College of Trusts and Estates Council (ACTEC) and the American College of Tax Council. He has published numerous articles, Tax Management Portfolios, and co-authored a law school casebook on Federal Income Taxation, now in its fourth edition. *J.D., State University of New York at Buffalo.*

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David E. Kahan – is a partner at Roberts & Holland LLP. David has concentrated on corporate, partnership and real estate taxation, as well as executive compensation for more than 30 years. He has structured acquisitions and sales of businesses through asset and stock transfers; planned and executed tax-free reorganizations, spin-offs and other distributions of stock; advised on like-kind exchanges of property and other real estate transactions; and designed and implemented complex joint ventures. He advises clients on tax and structural issues related to executive compensation from both an employer and employee perspective. He has negotiated and designed employment contracts, agreements for providing services in a non-employee capacity, stock bonus and stock option plans, and supplemental executive retirement plans and other deferred compensation arrangements. He is a member of the Tax Section of the New York State Bar Association and of the S Corporation Committee of the ABA Section of Taxation. He is co-author of a bi-monthly column on corporate taxation in the New York Law Journal.



Stuart I. Odell - is Of Counsel in the New York and San Francisco offices of Wilson Sonsini Goodrich & Rosati, where he is a member of the firm's energy and infrastructure finance practice. He has represented a broad range of public and private companies, both domestic and foreign, in a multitude of transactions, including so-called "cross-border" financings, such as cross-border leasing, international investment funds, and offshore reinsurance, among others. More recently, he has been actively involved in renewable and alternative energy transactions, both domestically and abroad, as well as domestic real estate transactions. Previously, Stuart was the head of the tax departments at two major law firms and was an adjunct professor of law at New York University School of Law in the Graduate Tax Program. He also served as the head of a major U.S. law firm's London office.



Avi Z. Kestenbaum – is a partner of the Private Wealth & Taxation Group at Meltzer Lippe and co-chairs the Trust & Estates Group. Avi provides creative and sophisticated domestic and international, income, estate and gift tax planning for high net worth individuals, closely held businesses and real estate owners; business succession and asset preservation planning; charitable, philanthropic and tax exempt organizations. Avi is an ACTEC Fellow and listed in Super Lawyers and Best Lawyers in America and an Adjunct Professor at Hofstra University School of Law. He is a prominent national lecturer for and to prestigious professional organizations including, but not limited to, the "NYU Tax Institute," the "Notre Dame Tax and Estate Planning Institute," "New York State Bar Association," "Ed Slott's Master Elite Program," the "American Bar Association," "Trust and Estates Magazine," "The American Bankers Association," "Estate Planning Council of New York" and "New York State CPA Society, Annual Estate Planning Conference," "STEP," and several national insurance companies and nonprofit institutions. B.S., Touro College (summa cum laude); J.D., Brooklyn Law School; University of Miami; J.D., Brooklyn Law School



Mary P. O'Reilly - is a partner in the Private Wealth & Taxation Group at Meltzer Lippe and Co-Chairs the Trusts and Estates Group. Mary assists individuals and families in the preservation and transfer of wealth and philanthropic planning. Her clients include family business owners, real estate developers, tax exempt organizations, investment bankers, private equity fund managers, physicians, inventors, entertainers, business professionals, retirees, non-resident aliens, domestic partners and those of inherited wealth. Mary's practice includes estate and trust administration. She represents executors in probating wills and administering estates and understands the delicate nature of losing a loved one and its impact on the estate administration process. She handles will contests, prepares and files estate tax returns, and represents fiduciaries in estate tax audits. B.A., Binghamton University (cum laude); J.D., St. John's University School of Law, LL.M., New York University.



Sharon L. Klein - is President of the Tri-State Region for Wilmington Trust, N.A., responsible for overseeing all Wealth Advisory Services in the New York City, Long Island, Westchester, Connecticut, and Northern New Jersey Regions. Sharon leads teams of professionals who provide planning, trust, investment management, family governance and education, family office, and private banking services, all designed to help high-net-worth individuals and families grow, preserve, and transfer wealth. Sharon has over two decades of experience in the wealth advisory arena and is a nationally recognized speaker and author. She has spoken for many professional organizations, including the Heckerling Institute on Estate Planning, the New York University Institute on Federal Taxation, the Notre Dame Estate Planning Institute, the Duke University Estate Planning Conference, and the Bloomberg BNA Tax Management Advisory Board. Sharon is frequently featured or quoted in publications such as The Wall Street Journal, The New York Times, Estate Planning Magazine, and Trusts & Estates Magazine.



Andrea Parness - is owner of A. Parness Company, a niche market CPA firm based in Belle Harbor, Queens, NY, has been in public accounting for over 30 years. Her firm which includes 8 staff members offers cloud accounting software conversions/integrations/support, virtual CFO services, business coaching and advisory services, accounting firm support, and casualty loss consulting. She and her firm have created a proactive 3 step system for identifying, evaluating and creating solutions for her clients to enable them to grow their profits while creating efficiency in their processes. Her firm continues to offer traditional services including personal, corporate, and estate tax services and planning. She is passionate about her collaboration with local business owners regarding various aspects of the use of technology to enhance business growth. Prior to starting her own firm she was a partner in a small CPA firm located in Great Neck, NY and worked as an internal auditor and financial analyst for a Fortune 500 company.

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Eric W. Penzer - is a partner at Farrell Fritz, P.C., concentrating in trusts and estate litigation. His practice includes contested probate proceedings, fiduciary accounting proceedings, discovery proceedings, and other litigation related to estates and trusts. He is a frequent contributor to Farrell Fritz's New York Trusts & Estates Litigation blog. Mr. Penzer is a Fellow of the American College of Trusts & Estates Counsel (ACTEC). He has an AV Preeminent Martindale-Hubbell Peer Review Rating.



Joy Spence - is an associate in the Tax Law Group at Meltzer Lippe, where she focuses her practice primarily on tax law, wealth management, and trusts and estates. She regularly assists clients in developing tailored plans to maximize asset protection and wealth preservation, while minimizing tax exposure. She also counsels individuals and families on developing tax-efficient structures and intra-generational wealth transfer strategies for estate, charitable, and business succession planning needs. B. S., Appalachian State University; J.D., Florida International University College; and LL.M., University of Miami. *Admitted in FL and CA only.*

Hon. Margaret C. Reilly - is the judge of the Nassau County Surrogate's Court. Prior to becoming a judge, Reilly worked as a Deputy Nassau County attorney, the village prosecutor of Stewart Manor, a senior Associate of Mulholland Minion & Roe and a senior associate of the Law Office of Vincent D. McNamara.



Elizabeth Valentin - is a partner with the law firm of Littman Krooks LLP. Ms. Valentin's practice focuses on elder law, Medicaid planning, special needs planning, guardianships, asset protection planning, trust and estate administration, and estate planning. Elizabeth is a frequent presenter to consumer and professional groups as well as advocacy organizations addressing the legal, financial and other related issues which affect our senior population. Ms. Valentin speaks fluent Spanish and often presents to Spanish speaking seniors in partnership with various advocacy organizations. Elizabeth is certified as an Elder Law Attorney (CELA) by the National Elder Law Foundation.



Daniel S. Rubin - is a partner in the Trusts and Estates and Asset Protection practice groups of the New York City law firm of Moses & Singer LLP. He has a B.A. in International Relations from the Elliot School of the George Washington University, a J.D. from Brooklyn Law School and an LL.M. in Taxation from the New York University School of Law. Mr. Rubin has been named by Worth magazine as one of the "Top 100 Attorneys" in the nation for private clients, by Law & Politics as a "New York Super Lawyer"® and as one of The Best Lawyers in America® for Trusts and Estates by U.S. News-Best Lawyers.



Mark E. Wilensky - is a partner in the Private Wealth & Taxation Group at Meltzer Lippe. Prior to joining the firm Mark was a tax attorney in the New York City office of Roberts & Holland LLP for 12 years. A large part of Mark's practice involves advising clients looking to sell, exchange, lease, or refinance real estate and take advantage of the tax deferral opportunities offered by section 1031 exchanges, installment sales, and long-term lease agreements. Mark is an Adjunct Professor at Cardozo School of Law. B.S., Johns Hopkins University, M.A., The University of Chicago; J.D., Columbia University; LL.M. Tax, New York University.



Sanford J. "Sandy" Schlesinger - is a founding partner of the law firm of Schlesinger Lazetera & Auchincloss LLP, formerly Schlesinger Gannon & Lazetera LLP. Mr. Schlesinger is a nationally recognized expert in the areas of estate and tax planning, estate administration, family-owned business planning, charitable planning and all related areas. He also handles all aspects of contested and litigated estate, trust and related tax matters. Mr. Schlesinger is a fellow of the American College of Trust and Estate Counsel and is a past Downstate New York Chair and a former member of its Charitable Planning and Exempt Organizations Committee. New York City Bar (2013 through 2016), the Editorial Board of the New York State Bar Journal (Emeritus since 2006), Board of Directors of the New York State Bar.



Gerald P. Wolf - is founding partner of The Wolf Law Group, P.C.. Jerry counsels a diverse group of ERISA, estate planning and closely held business clients. He has designed and implemented complex tax saving estate and asset protection plans for high net worth individuals; qualified pension and profit sharing plans (including 401(k), cash balance and ESOP) and executive compensation programs for Fortune 500 companies, hospitals, banks, law and medical firms, and closely-held businesses; and shareholder, partnership, and LLC agreements and executive employment contracts on behalf of closely held businesses. Jerry was the only Long Island attorney awarded Super Lawyer status in the New York Metro Region for 2010, 2011 and 2012 in the Employee Benefits/ERISA category, was awarded Super Lawyer status in the Corporate Counsel Edition for 2009, and is a Fellow of the prestigious American College of Employee Benefits Counsel.



Martin M. Shenkman - CPA, MBA, PFS, AEP (distinguished), JD, is an attorney in private practice in Fort Lee, New Jersey and New York City. Practice: Estate and tax planning, planning for closely held businesses, estate administration. Publications: Author of 42 books and more than 1,000 articles. Editorial Board Member of Trusts & Estates Magazine, CCH (Wolter's Kluwer) Co-Chair of Professional Advisory Board, CPA Journal, and the Matrimonial Strategist. Has previously served on the editorial board of many other tax, estate and real estate publications.



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PRIVATE WEALTH & TAXATION INSTITUTE

See following pages for:

- Registration Form
- Form of Payment
- Webinar Information
- Directions to the event
- Parking information

2018

PRIVATE WEALTH & TAXATION INSTITUTE

Registration Form – Please complete and return

5th Annual Private Wealth & Taxation Institute ♦ June 6-7, 2018

| CONTACT INFORMATION | SESSIONS |
|---------------------|----------|
|---------------------|----------|

Please register for the session you would like to attend.

NAME _____

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CITY _____ STATE _____ ZIP _____

TELEPHONE _____

REGISTRANT EMAIL _____

☐ Day 1- June 6

☐ Cocktail Party-June 6

☐ Day 2 –June 7

☐ Both Days

☐ Webinar Day 1-June 6

☐ Webinar Day 2-June 7

Dietary Restrictions:

☐ Kosher ☐ Gluten Free ☐ Other _____

| REGISTRATION AND MATERIALS | CONTINUING EDUCATION CREDIT |
|----------------------------|-----------------------------|
|----------------------------|-----------------------------|

Fee includes: one set of materials, breakfast and lunch.

☐ \$75.00 (\$100.00 at Door) Day 1 Registration

☐ \$75.00 (\$100.00 at Door) Day 2 Registration

☐ \$150.00 (\$200.00 at Door) Both Days Registration

☐ NCCPAP Member*

Please indicate which credit you wish to receive

☐ CLE

☐ CPE

☐ Both CLE & CPE

**Materials – Advanced materials selection is required,
on-site availability will be limited (please choose one)**

☐ Printed Materials ☐ CD-ROM

☐ USB Flash Drive ☐ Download Materials

*NCCPAP Members discounted rate \$65.00 per day, \$130.00 for Both Days.

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PRIVATE WEALTH & TAXATION INSTITUTE

ONLINE REGISTRATION



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**For more information please call
516-747-0300 ext. 125**

**Please register by May 21st
Seating is limited.**

For administrative use only

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WEBINAR INSTRUCTIONS:

- 1- Instructions for logging into the Webinar will be sent via email 2 days before program.
- 2- Course materials, affirmation and evaluation forms will be sent via email 2 days before program.

DIRECTIONS TO HOFSTRA:

While most may use GPS, *please* follow the directions below to properly guide you to the event location on the Hofstra campus:

From Meadowbrook Parkway heading north: Take Meadowbrook Parkway North to Exit M4, Hempstead Turnpike (Route 24) West (the sign will say, "Hempstead and Coliseum"). Stay on **Hempstead Turnpike** to **California Avenue** (which is the traffic light just before the 2nd covered walkway over Hempstead Turnpike and just after the **Dunkin' Donuts** on your left).

Make a left onto California Avenue. Go past the first stop sign on California Avenue. When you see **Au Bon Pain** on your **RIGHT**, continue past the restaurant. **Koppelman Hall is on your RIGHT.**

PARKING AT HOFSTRA

Parking is limited in front of Koppelman Hall. **Additional parking** is available behind Allan Todd Gittleson Hall on your left (across from Au Bon Pain).



To the students, alumni, faculty and staff of the Maurice A. Deane School of Law at Hofstra University, the law is not just something to be studied — it is to be lived. It informs our careers, our lives and our interactions with fellow citizens. It is the means by which we make an impact in the world. Courts, law firms and employers recognize the significance of a Juris Doctor (J.D.) from Hofstra Law, or a degree from our joint J.D./M.B.A. and J.D./M.P.H. programs, because they know our graduates are renowned for their legal knowledge, preparedness and poise.



Meltzer Lippe is a law firm combining the best features of small firms with lawyers from major Metropolitan law firms. It functions in a full range of business areas: tax, corporate, real estate, labor and employment, commercial litigation and social media and privacy law, as well as wealth planning for high net worth individuals and trusts and estates.



STEP is the worldwide professional association for those advising families across generations. STEP's mission is to help families plan their assets across generations by promoting high professional standards; educating professionals; connecting advisors and families globally; informing public policy; and acting in the public interest. For more information or to become a member of The Society of Trust and Estate Practitioners please visit our website www.step.org or contact Stacey Harris, STEP Long Island Coordinator at STEPLongisland@mlg.com