

2017

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 - May 24, 2017

Day 2 - May 25, 2017

Sessions run from 9:00am – 5:30pm

Maurice A. Deane School of Law at Hofstra University

Registration: \$60 Per Person/Per Day (in advance/non-refundable)

\$75 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 15, 2017
events@meltzerlippe.com

SPECIAL FEATURE ON DAY 1

UJA-FEDERATION OF NY BUD ROSNER LECTURE ON PLANNED GIVING

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 8 FOR DIRECTIONS TO EVENT

2017

PRIVATE WEALTH & TAXATION INSTITUTE

Schedule

WEDNESDAY, MAY 24

AM SESSION

3.5 CLE/CPE

- 8:00 – 8:30 Breakfast and Sign In
- 8:30 – 8:45 Introduction to Program
Stephen M. Breitstone
- 8:45 – 10:15 Private Wealth Planning for the Changing Environment and Tax Reform
Stephen M. Breitstone, Professor Jerome M. Hesch, Sharon L. Klein and Paul S. Lee
- 10:15 – 10:30 Break
- 10:30 – 12:00 “So You Want To Be a Trustee?” Discussion of Risks and Goals for the Non-Institutional Fiduciary: What Alternatives Should Be Considered? Use of Private Trust Companies and Other Cutting Edge Solutions
Al W. King, III
- 12:00 – 1:00 Lunch

WEDNESDAY, MAY 24

PM SESSION

5.0 CLE/CPE

- 1:00 – 2:30 **UJA-Federation of NY Bud Rosner Lecture on Planned Giving**-Incorporating Philanthropy into your Life and Estate Plan
Sanford J. Schlesinger
- 2:30 – 3:45 Fiduciary Accounting A to Z
Robert S. Barnett, Ilene S. Cooper, Jason J. Smith and Christopher D. Wright
- 3:45 – 4:00 Break
- 4:00 – 5:30 Fiduciary Risk Assessment-How to Avoid the Law of Unintended Consequences
Jerald D. August

Question and Answer period will follow each topic

2017

PRIVATE WEALTH & TAXATION INSTITUTE

Schedule (Continued)

THURSDAY, MAY 25 AM SESSION 3.5 CLE/CPE

- 8:00 – 8:30 Breakfast and Sign In
- 8:30 – 8:45 Introduction to Program
Stephen M. Breitstone
- 8:45 – 9:45 Tax Planning For Real Estate-Is Real Estate Still the Favored Child Of the Tax Code?
Stephen M. Breitstone, Robert N. Brown, David E. Kahan and Mark E. Wilensky
- 9:45 – 10:45 “Hiding the Ball” Anonymity, Tax Law and the U.S. as the World’s Favorite New Tax Haven
Prof. Alan I. Appel, Assistant US Attorney Sarah E. Paul and Leonard Schneidman
- 10:45 – 11:00 Break
- 11:00 – 12:00 The Long Term Care Dilemma-Changes in the LTC Landscape that Can Benefit Clients Tax and Estate Planning
Natalie Karp and Rona Loshak
- 12:00 – 1:00 Lunch

THURSDAY, MAY 25 PM SESSION 4.5 CLE/CPE
(2 in Ethics)

- 1:00 – 2:10 Practitioners Surrogate Court Update-Hear from Nassau and Suffolk Surrogate’s Court Experts
Hon. John M. Czygier, Jr., Hon. A. Gail Prudenti, Jason J. Smith and Sally M. Donahue
- 2:10 – 3:00 Where Tax Exempts and For Profit Enterprises Intersect-A Discussion of the Tax and Legal Parameters-Applications to Health Care and to the Emerging Technologies
José L. Berra, Stephen M. Breitstone and Marianna Schwartzman
- 3:00 – 3:15 Break
- 3:15 – 4:15 Ethics Part I- Business Succession Planning – Practical Tax, Financial and Ethical Considerations
Professor Linda Galler, Avi Z. Kestenbaum and Mary P. O’Reilly
- 4:15 – 5:15 Ethics Part II- Did you see “60 Minutes” Exposé on Attorney’s Advising Clients on Ethically Challenging Events? How to Avoid Compromising Your Ethics and Your Freedom
Stephen M. Breitstone and Professor Linda Galler

Questions and Answer period will follow each topic

PRIVATE WEALTH & TAXATION INSTITUTE FACULTY

DIRECTOR



Stephen M. Breitstone – is a partner and Vice Chairman of Meltzer Lippe, Director of the Private Wealth & Taxation Institute, Chair of the Private Wealth & Taxation Group at Meltzer Lippe and STEP Long Island's Co-Chair. The Private Wealth & Taxation Group includes both the Tax Group and Trusts & 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.*

2017 FACULTY



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.*



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 Accounts, the AICPA Private Companies Practice Section, the New York State Society of Certified Public Accountants and the National Conference of CPA Practitioners.



Jerald D. August – is a partner at Kostelanetz & Fink, LLP. Jerry focuses on advising clients on federal and state income tax matters, including transactional tax planning as well as tax controversies and litigation before the Internal Revenue Service. He works with clients in Manhattan and New York as well as in Philadelphia and the Greater Philadelphia metropolitan area as well as in Palm Beach County, Florida. In short, he has long enjoyed a national practice in matters involving federal and state taxation. In addition to New York (2011), he is admitted to the Florida Bar (1977) and the Pennsylvania Bar (1980). *B.A., and B.S., Wharton School of the University of Pennsylvania; J.D., University of Pittsburgh School of Law.*



Ilene Sherwyn Cooper - partner at Farrell Fritz, P.C., is an estate litigator practicing in Surrogate's Courts throughout New York and the author of several legislative amendments affecting the laws of inheritance in New York. She has extensive experience administering decedents' estates, drafting and executing wills and trust instruments, powers of attorney, healthcare proxies and living wills. Previously, she worked as a Principal Law Assistant/Referee for the Surrogate of Suffolk County, Hon. Ernest L. Signorelli. Ilene has held leadership roles with many state and local professional and community organizations. This includes serving as chair of the New York State Bar Association's 5,000+ member Trusts and Estates Law Section, as a member of the New York State Bar Association's House of Delegates, as president of the Suffolk County Bar Association and as a Fellow of the American College of Trust and Estate Council (ACTEC). She is also an adjunct professor at Touro College Jacob D. Fuchsberg Law Center. *B.A. Cornell University; J.D., Hofstra University School of Law.*



Robert S. Barnett - is a founding partner of Capell Barnett Matalon & Schoenfeld LLP, Attorneys at Law. His practice is highly concentrated in the areas of taxation, trusts, estates, corporate and partnership law and charitable planning. His experience includes Surrogate's Court practice, tax dispute resolution in both Federal and State jurisdictions, and Tax Court representation. Mr. Barnett frequently assists clients in structuring financial transactions and charitable gifts. *B.S., Hofstra University (magna cum laude); J.D. Fordham University, (cum laude).*



Hon. John M. Czygier, Jr. – Judge of the Surrogate's Court, Suffolk County was admitted to practice law in New York State in 1975. After serving as a prosecutor in the Suffolk County District Attorney's office, he entered private practice and, for 25 years, concentrated in estate administration and estate litigation in the New York metropolitan area. He is a member of the Suffolk County Bar Association where he served as Director, Chair of the Surrogate's Court Committee and Co-Chair of the Bench Bar Committee. *J.D., Hofstra University School of Law.*



José L. Berra – is counsel to the Private Wealth & Taxation Group at Meltzer Lippe. Prior to attending The University of Chicago Law School, José was a C.P.A. at Ernst & Young. After four years at Morgan, Lewis, José moved to Paul, Weiss, Rifkind, Wharton & Garrison. José served in the U.S. Dept. of Treasury's Office of Tax Policy. At Meltzer Lippe, José represents clients in many areas including sophisticated real estate, partnership and other business transactions as well as business and financial analysis and advice. He also engages in related controversy work before the IRS and other government agencies. *B.S., State University of New York at Albany; J.D., The University of Chicago Law School.*



Sally M. Donahue - is a partner at Jaspan Schlesinger LLP in the Trusts and Estates practice group. Ms. Donahue concentrates in Surrogate's Court litigation, an area in which she has more than twenty years of experience. She also handles Trusts and Estates planning and administration and Guardianships. Ms. Donahue was a Court Attorney-Referee at the Nassau County Surrogate's Court from 2006 to 2011. Additionally, she practiced for many years at two prestigious law firms on Long Island in the areas of Trusts and Estates, Guardianships and Commercial Litigation. Ms. Donahue is a member of the New York State Bar Association and is a member of the Nassau County Bar Association where she has been appointed Co-Chair for the 2016 - 2018 term of the Surrogate's Court Estates and Trusts Committee. *B.A., Adelphi University; J.D., Touro College Jacob D. Fuchsberg School of Law.*

PRIVATE WEALTH & TAXATION INSTITUTE FACULTY



Professor Linda Galler - is Professor of Law at the Maurice A. Deane School of Law at Hofstra University. She is the lead author of "Regulation of Tax Practice," published by Carolina Academic Press as part of its Graduate Tax Series, and is a former chair of the ABA Tax Section's Standards of the Tax Practice Committee. Professor Galler also is Senior Tax Counsel to the New York City law firm Curtis, Mallet-Prevost, Colt & Mosle, where she consults in the areas of international taxation, corporate taxation, administrative practice and court procedure. Professor Galler has chaired the Standards of the Tax Practice Committee and the Teaching Taxation Committee of the ABA Section of Taxation. She is a member of the Academic Advisory Board of The Theodore Tannenwald, Jr. Foundation for Excellence in Tax Scholarship. B.A., Wellesley College; J.D., Boston University; LL.M., New York University.



Avi Z. Kestenbaum - is a partner of the Private Wealth & Taxation Group at Meltzer Lippe and co-chairs the Trusts & 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," "Trusts 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; LL.M. Tax, University of Miami Law School.



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 Trust and Estate Counsel (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.



Al W. King III - is based in New York City and the Co-Founder, Co-Chairman and Co-Chief Executive Officer of South Dakota Trust Company, LLC (SDTC) and South Dakota Planning Company (SDPC). SDTC is a national trust boutique for the wealthy based out of Sioux Falls, South Dakota serving clients nationally and internationally. Mr. King was previously Managing Director and National Director of Estate Planning for Citigroup, and was also the Co-Founder and Vice Chairman of Citicorp Trust South Dakota. Mr. King is the Co-Chair of the *Trusts and Estates Magazine Editorial Board*. He received his B.A. from Holy Cross College, his J.D. from Syracuse University Law School and his LL.M. Tax from Boston University Law School.



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 20 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 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. He received a B.A. from Yale and his J.D. from Columbia, where he was a Stone Scholar and an editor of the Law Review.



Sharon L. Klein - Sharon is President of the Tri State Region for Wilmington Trust, N.A., responsible for overseeing all Wealth Advisory Services. Sharon leads a team of professionals who provide planning, trust, investment management, family governance and education, family office, and private banking services. Sharon is a Fellow of the American College of Trusts and Estates Council and has over 25 years of experience in the wealth advisory arena. She is a nationally recognized speaker and author, and 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, The New York Law Journal and Trusts & Estates Magazine.



Natalie Karp MBA, CLTC and Rona Loshak, MBA, CLTC are highly accredited, award winning specialists in LTC Insurance and ranked by The American Association of Long Term Care Insurers as top professionals in New York State and Nationally ranked since 2009. In 2014, they were selected as a Goldman Sachs 10,000 Small Business and as Long Island Achievers' Honorees in 2015. Karp Loshak LTC Solutions is a trusted source of information on Long Term Care Insurance for individuals, business owners and employer groups. Exclusively focused, their expertise includes traditional (stand-alone) Long Term Care Insurance policies, Hybrid Life/LTC plans, Life with LTC riders, financing LTC Insurance and providing LTC Insurance with tax and estate advantages. The duo is well regarded for their educational platform and consultative approach. Recognized as a resource by the Wall Street Journal and Newsday for their expertise on long term care insurance, Karp Loshak LTC Insurance Solutions provides valuable advice to consumers and professional advisors.



Paul S. Lee - is a Managing Director and Senior Regional Wealth Advisor with The Northern Trust Company. Prior to joining Northern Trust, he was at Bernstein Global Wealth Management as National Managing Director, and a partner in the Atlanta-based law firm of Smith, Gambrell & Russell, LLP. Mr. Lee was the recipient of the Georgia Federal Tax Conference Award for Outstanding Tax Student and the Ernst & Young Award for Tax and Accounting. Mr. Lee is a Fellow of the American College of Trust and Estate Counsel. In 2014, Mr. Lee was inducted into the NAEPC Estate Planning Hall of Fame®, and designated an Accredited Estate Planner® (Distinguished). A frequent lecturer and panelist on investment planning, tax and estate planning, Mr. Lee has spoken at the Heckerling Institute on Estate Planning, ACTEC National Meeting, Southern Federal Tax Institute, USC Institute on Federal Taxation, Southern California Tax & Estate Planning Forum, Notre Dame Tax and Estate Planning Institute, AICPA National Tax Conference and the AICPA Advanced Estate Planning Conference. Mr. Lee co-authored the law review article, "Retaining, Sustaining and Obtaining Basis," which was awarded Outstanding Law Review Article in 2016 by the Texas Bar Foundation.

PRIVATE WEALTH & TAXATION INSTITUTE FACULTY



Mary P. O'Reilly - is a partner in the Private Wealth & Taxation Group at Meltzer Lippe. 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. B.A., Binghamton University (*cum laude*); J.D., St. John's University School of Law, LL.M. Tax, New York University.



Leonard Schneidman - Managing Director of Andersen Tax, has over 40 years of experience in international taxation. His work includes counseling clients on structuring and operation of private investment funds, advising high net worth foreign investors on U.S. investments and activities, helping U.S. and non-U.S. corporate clients with tax-efficient structuring of their business operations, and advising clients on the reporting of undisclosed income and/or foreign financial assets from offshore accounts through the IRS Offshore Voluntary Disclosure Program (OVDP) or Streamlined Filing Compliance Procedures, and Report of Foreign Bank and Financial Accounts (FBAR).



Sarah E. Paul - is an Assistant United States Attorney in the Southern District of New York. Prior to joining the U.S. Attorney's Office, Sarah worked in private practice at the boutique firm of Spears & Imes, LLP, where she handled white collar criminal and civil litigation, and at the firm of Cravath, Swaine & Moore, LLP, where she handled complex civil litigation. Since last August, Sarah has served as the Tax Coordinator for all tax cases in the Southern District of New York. B.A., Cornell University; J.D. New York University School of Law.



Marianna Schwartzman - is an associate in the Private Wealth & Taxation Group at Meltzer Lippe. Prior to joining Meltzer Lippe, Marianna practiced law at the New York City law firm of Katten Muchin Rosenman LLP, where she focused her practice on estates and trusts administration and domestic estate planning for high net worth individuals. Marianna continues to practice in all aspects of personal representation of individuals and families, as well as representation of fiduciaries. She successfully administers estates of significant volume and complexity, including probate and post-mortem tax elections and allocations. Marianna specializes in advising fiduciaries and families through all the stages of estates and trusts administration. B.A., Hunter College, (*with honors*); J.D., Fordham University School of Law.



Hon. Gail A. Prudenti - On January 1, 2017 Judge A. Gail Prudenti was appointed Interim Dean of the Maurice A. Deane School of Law at Hofstra, where she also serves, as of September 1, 2015, as the Executive Director of the Center for Children, Families and the Law. Prior to her current position at Hofstra, Judge Prudenti distinguished herself as a well-respected jurist and hands-on administrator throughout a judicial career that lasted more than two decades. Most recently, she served as the Chief Administrative Judge of the courts of New York State, having been appointed by Chief Judge Jonathan Lippman on December 1, 2011. As Chief Administrative Judge, she supervised the administration and operation of the statewide court system, with a budget of over \$2.7 billion, 3,600 state and locally paid Judges and 15,000 non-judicial employees in over 350 court facilities.



Jason J. Smith - is a partner in the Private Wealth & Taxation Group at Meltzer Lippe. Jason focuses his practice on estate planning, asset protection, estate and trust administration and litigation. Jason's estate planning practice includes assisting individuals and families with tax-efficient and practical estate and gift planning, including the preparation of wills, revocable living trusts, insurance trusts and qualified personal residence trusts, grantor retained annuity trusts and dynasty trusts. He also counsels clients on asset protection strategies, including the use of trusts and the preparation of prenuptial agreements. His estate and trust administration practice dovetails with his trusts and estates litigation practice, where he advises clients in contested will and probate proceedings, fiduciary removal proceedings, trust construction cases, contested accountings proceedings, discovery and turnover proceedings and conservatorships and guardianship matters. Jason's trusts and estates litigation practice is augmented by his prior experience representing clients in complex commercial, class action, intellectual property and medical malpractice cases at the trial and appellate levels in both federal and state courts. B.S., New York University (*magna cum laude*); J.D., Yale Law School.



Sanford J. Schlesinger - Sanford ("Sandy") J. Schlesinger is a founding partner of the law firm of 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. J.D., Fordham University, B.S. (with honors), Columbia University.



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.



Christopher D. Wright, Esq., CPA - is a Senior Tax Manager at Marks Paneth LLP. He works exclusively in the trust, estate and gift tax arena. In addition, he advises fiduciaries on estate and trust administration issues, including informal and formal fiduciary accountings. With over 30 years of accounting and taxation experience, Mr. Wright began his career with Arthur Andersen & Co. in both the Portland, Oregon and New York offices. Immediately prior to joining the firm in 2014, he had his own law and accounting practice based in Portland Oregon, which focused primarily on the needs of business owners and estate planning. Mr. Wright has devoted much of his career to the tax and estate planning issues that are unique to same sex couples.

See following pages for:

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

2017 PRIVATE WEALTH & TAXATION INSTITUTE

Registration Form – Please complete and return

4th Annual Private Wealth & Taxation Institute ♦ May 24-25, 2017

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

Please register for the session you would like to attend.

NAME _____
FIRM _____
MAILING ADDRESS _____

CITY _____ STATE _____ ZIP _____
TELEPHONE _____
REGISTRANT EMAIL _____

- ☐ Day 1- May 24
☐ Day 2 –May 25
☐ Both Days
☐ Webinar Day 1-May 24
☐ Webinar Day 2-May 25

Dietary Restrictions:

☐ Kosher ☐ Gluten Free ☐ Other _____

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

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

- ☐ \$60.00 (\$75.00 at Door) Day 1 Registration
☐ \$60.00 (\$75.00 at Door) Day 2 Registration
☐ \$120.00 (\$150.00 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**

- ☐ Printed Materials ☐ CD-ROM
☐ USB Flash Drive ☐ Download Materials

*NCCPAP Members discounted rate \$50.00 per day, \$75.00 for Both Days.

2017 PRIVATE WEALTH & TAXATION

ONLINE REGISTRATION



Email: events@meltzerlippe.com

REGISTER BY MAIL



Mail registration form and payment to:

Private Wealth & Taxation Institute
190 Willis Avenue
Mineola, NY 11501

CREDIT CARD PAYMENT

☐ VISA ☐ MasterCard ☐ Discover ☐ Amex

Name on Card

Card Number

CVV Code

Exp Date

CC Billing Address

City

State

ZIP

Phone No

Email Address

☐ Check enclosed payable to:

Private Wealth & Taxation Institute

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

**Please register by May 15th.
Seating is limited.**

For administrative use only

Authorization Code: _____ \$ _____

For administrative use only

Check Number: _____ \$ _____

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 Tod Gitleson Hall on your left (across from Au Bon Pain).

We are proud to support

THE 4TH ANNUAL
PRIVATE WEALTH & TAXATION
INSTITUTE CONFERENCE

To learn about our wealth management capabilities,
please contact

ROBERT STORTI, CFP®
Senior Vice President, Senior Trust Officer
631.547.7629
robert.storti@ustrust.com

300 Broadhollow Road
Melville, NY 11747

ustrust.com

U.S. TRUST 
Bank of America Private Wealth Management

U.S. Trust operates through Bank of America, N.A., Member FDIC.

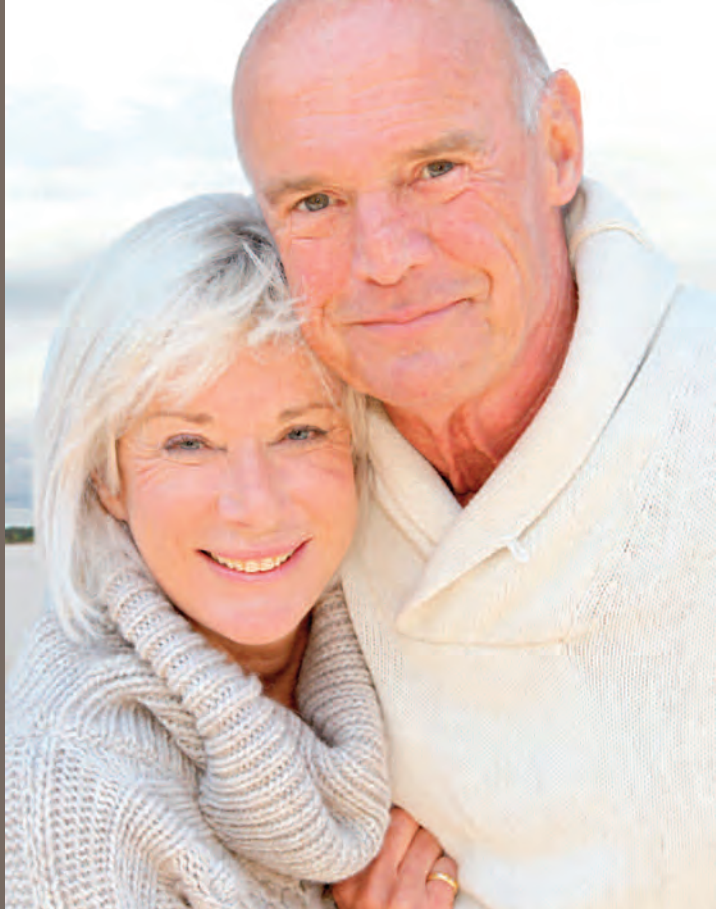
Bank of America and the U.S. Trust logos are trademarks of Bank of America Corporation.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP® and CERTIFIED FINANCIAL PLANNER™ in the U.S.

© 2017 Bank of America Corporation. All rights reserved. | ARYPJH3Q | UST-132-AD



*We are proud to support
the 4th Annual Private
Wealth & Taxation Institute*



Rona Loshak, MBA, CLTC | Natalie Karp, MBA, CLTC

Specialists in All Aspects of Long Term Care Insurance Planning

- Affiliated with all carriers
- Asset Based or Hybrid Solutions
- Licensed in over 20 states
- Financing and Funding LTC Insurance Using Tax Favored Vehicles
- Traditional or Stand Alone LTC Insurance
- Life Insurance Policies with LTC riders
- State Partnership Plans

Award winning, highly accredited and recognized by the
Wall Street Journal as one of the most respected and
knowledgeable resources for Long Term Care insurance Planning




Planning Today.
Protecting Tomorrow.™

516-801-1419 | www.karploshak.com | info@karploshak.com

A black and white photograph of the New York City skyline, featuring the Empire State Building prominently in the center. The image is used as a background for the top half of the advertisement.

Rigorously prepared and meticulously
documented valuations for over 75 years.

A black and white photograph showing a close-up view of several skyscrapers in a city, likely New York City, with their windows and architectural details clearly visible.

MPI is proud to sponsor the 4th Annual
Private Wealth & Taxation Institute Conference.

Todd G. Povlich, CFA, ASA

708 Third Ave, Suite 1905

New York, NY 10017

212-390-8310 | tpovlich@mpival.com

To learn how MPI can help you meet your
clients' needs, visit www.mpival.com.

New York

Chicago

Boston

Hartford

Orlando

Princeton

A SPECIAL THANK YOU TO OUR SPONSORS



UJA Federation
NEW YORK



**National Conference
of CPA Practitioners**



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.



ADVISING FAMILIES ACROSS GENERATIONS

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

SPONSORSHIP OPPORTUNITIES AVAILABLE

Interested in becoming a sponsor for the
2018 Private Wealth & Taxation Institute?

Email us at: events@meltzerlippe.com

Private Wealth & Taxation Institute Ltd is a 501(c)(3) nonprofit organization.