

Save the Date!

Nassau Chapter All-Day

Estate and Personal Financial Planning Conference

Presented by the Estate and Personal Financial Planning Committee, Nassau Chapter,
New York State Society of Certified Public Accountants

TOPICS AND SPEAKERS:

Form 1041 – Income Taxes after ATRA

Robert S. Barnett, CPA, Esq., *Capell Barnett Matalon & Schoenfeld LLP*

Updates on Elder Law and Medicaid Planning

Steven H. Stern, CELA, *Davidow, Davidow, Siegel & Stern, LLP*

Selecting and Designating the Proper Beneficiaries for Qualified Plans and IRAs

Victor Finmann, Esq., *Cullen & Dykman, LLP*

Estate Planning Update for 2014 and Beyond

Eric M. Kramer, CPA, Esq., *Farrell Fritz, P.C.*

Defective Grantor Trusts

Neil D. Katz, JD, LL.M, *Katz, Bernstein & Katz, LLP*

Trust-Owned Life Insurance Issues, Consequential Liabilities and Corrective Strategies

Henry Montag, CFP, CLTC, *Financial Forums, Inc.*
E. Randolph Whitelaw, AEP, *Trust Asset Consultants, LLC*

709 & 706 Preparation for the Practitioner

TBD

And a Q&A Panel Discussion with Our Presenters – Have your questions ready!

Nassau Chapter President:

Scott Sanders, CPA/PFS, CFP, CFS
Sanders, Thaler, Viola, & Katz, LLP

Conference and Committee Chairpersons:

Christine Hallahan, CPA,
Wagner, Ferber, Fine & Ackerman, CPAs
Eric Kramer, CPA, Esq., *Farrell Fritz, P.C.*
Scott Sanders, CPA, PFS, CFP, CFS,
Sanders, Thaler, Viola, & Katz, LLP
Yvonne Cort, Esq., *Karen J. Tenenbaum, P.C.*

Register Today!

Register online at www.nysscpa.org.

Register by fax at (866) 495-1354. Register by phone at (800) 537-3635.

Saturday, January 11, 2014

Melville Marriott

Long Island

1350 Walt Whitman Road

Melville, NY 11747

9:00 a.m.–5:15 p.m.

(Registration and

Networking

Breakfast begin

at 8:30 a.m.)



Designed for: Financial professionals who have basic knowledge of taxation and estate planning.

Objective: To update participants on the impact of recent legislation and tax law changes, and to provide practical application in compliance.

Course Details:

Time: 9:00 a.m.–5:15 p.m. (Registration and Networking Breakfast begin at 8:30 a.m.)

Course Level: Update

Prerequisite: None

Method of Presentation: Lecture, panel discussion, and question-and-answer session

Field of Study: Taxation

Recommended CPE Credit Hours: 8

Developer: Nassau Chapter Estate and Personal Financial Planning Committee, NYSSCPA

Course Code: 28603426

Member Fee: \$150

Nonmember Fee: \$250

Important! Please use one registration form per person. This form may be photocopied. To register, fill in the registration information in the space provided. Be sure to include your certificate number and your full payment.

Register online at www.nysscpa.org. Or mail your payment and registration form to:

Foundation for Accounting Education

P.O. Box 10490

Uniondale, NY 11555-0490

Or fax to: (866) 495-3354. Or phone (212) 719-8383 or (800) 537-3635.

Credit card information must accompany all fax, phone, and online registrations.

Please be sure to type or print clearly when faxing.

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Today's Date _____ Are you a CPA? Yes No Member NYSSCPA? Yes No

CPA Certificate No. _____

Name (Print) _____

Title (Print) _____

Firm _____

Firm Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____

E-mail _____

E-mail address **required** in order to receive course material.

Check One:

Member Fee: \$150

Nonmember Fee: \$250

Method of Payment

Check payable to FAE American Express MasterCard Visa Discover

Credit Card No. _____ Exp. Date _____

Card Holder's Name _____

Card Holder's Signature _____

13-0391

Walk-ins: All individuals who register on the date of the program will be charged an additional \$25 fee.

Registration Information

How To Register: Simply complete the attached registration form in full and return it with full payment by mail or fax. Or phone or register online at www.nysscpa.org. Registration forms may be photocopied, but please use a separate form for each registrant. Payment may be made by check or may be charged to American Express, MasterCard, Visa, or Discover. All registrations must be received 14 days prior to the event in order to guarantee a seat and course materials. Participants with special requirements should notify FAE staff at least 14 days in advance of the event.

Refund, transfer, walk-in, and cancellation: Fee policies are available for review at www.nysscpa.org.

Mandatory Continuing Education Requirement: This program complies with the standards set forth by the New York State Education Department for mandatory continuing education for CPAs. FAE's New York State CPE sponsor number is 000372; New Jersey 20CE0022200; Pennsylvania PX177239.

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