The New York Society of CPA's Suffolk Chapter
Estate & Financial Planning Committee
presents

RECENT ASSET PROTECTION TECHNIQUES THAT A PRACTITIONER NEEDS TO KNOW

Thursday, November 7, 2013

Enrollment Limited to the First 20 Registrants

Time: 7:30 am – 10:00 am
(7:30 – 8:00 registration & continental breakfast)

Fee: FREE

Location: Valley National Bank
580 East Jericho Turnpike, Huntington Station, NY 11746
(631) 271-5900

Speakers:

Henry Montag, CFP, CLTC, the principal of Financial Forums Inc., Uniondale, New York which provides educational workshops, seminars and conferences for professional and consumer organizations

Seymour Goldberg, CPA, MBA, JD, a senior partner in the law firm of Goldberg & Goldberg, P.C., Woodbury, New York and co-chair of the Estate & Financial Planning Committee

2 CPE Credits (1 credit Specialized Knowledge and 1 credit Taxation)
NY Sponsor: Foundation for Accounting Education
Course Code: 29086410
Level: Intermediate
Prerequisite: None
Method of Presentation: Lecture, questions and answers
Subject Area: Specialized knowledge and Taxation
Learning Objective: To acquire knowledge of the pending IRS Compliance initiative regarding IRA accounts; fiduciary liability issues involving trust owned life insurance and Pension Protection Act techniques

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2 CPE CREDITS

Name:____

Firm:____

Address:____

City,State,Zip:_______________________________________

Telephone:____

E-mail:____

Please mail or email registration form to:

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