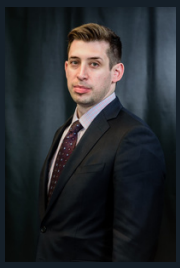
Essential Estate Planning Strategies And Updates For Senior Attorneys

WHAT YOU NEED TO KNOW



Matthew Rappaport

Seymour Goldberg

Henry Montag

Seymour Goldberg, Matthew Rappaport, and Henry Montag overview how to execute an effective estate plan in New York, including recent updates relevant to attorneys. Topics covered include an overview of the changes to the Retirement Distribution Rules under the Secure Act, Advantages of Trusts as an IRA Beneficiary and why many IRA Beneficiary Forms are Defective. The panel will cover recent estate planning updates, and best practices for life insurance utilization with IRA trusts, and other estate planning matters.

Register @ NYSBA
May 13, 2021
12:00 - 2:00pm EST

Panelists

Seymour Goldberg, CPA, MBA, JD

Seymour Goldberg is the senior partner in the law firm of Goldberg & Goldberg, P.C., Melville, New York. Mr. Goldberg is also Professor Emeritus of Law and Taxation at Long Island University, recipient of the American Jurisprudence Award in Federal Estate and Gift Taxation from St. John's University School of Law, and the author of 4 Manuals for the ABA on IRAs & Trusts.

Mr. Goldberg has acted as a CLE instructor for many professional organizations including the New York State Bar Association, ABA, and many local bar associations. Mr. Goldberg is a member of the Committee on Relations with the IRS of the New York State Society of CPAs. Mr. Goldberg has given in excess of 100 CPE programs involving IRAs and IRA compliance issues.

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Matthew E. Rappaport, Esq., LL.M. (Taxation)

Matthew E. Rappaport is Vice Managing Partner of Falcon Rappaport & Berkman PLLC, and he chairs its Taxation and Private Client Groups. He concentrates his practice in Taxation as it relates to Real Estate, Closely Held Businesses, Private Equity Funds, and Trusts & Estates. He advises clients regarding tax planning, structuring, and compliance for commercial real estate projects, all stages of the business life cycle, generational wealth transfer, family business succession, and executive compensation. He also collaborates with other attorneys, accountants, financial advisors, bankers, and insurance professionals when they encounter matters requiring a threshold level of tax law expertise. Mr. Rappaport graduated from Washington University in St. Louis in 2007, cum laude, with an undergraduate degree in Political Science. He received his Juris Doctor and Master of Laws in Taxation from Georgetown University Law Center in 2011.

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Henry Montag, CFP, CLTC

Henry Montag, CFP, is Managing Director of The TOLI Center East and has been in practice since 1976 with offices in Long Island and New York. Mr. Montag has authored articles and acted as a source for NYSBA Senior Lawyer, NYSSCPA Tax Stringer, Tax Facts, Bloomberg's Estates Gift & Trust Journal, Trusts & Estate Magazine, Accounting Today, Financial Planning, and The Wall Street Journal. He has appeared as a guest on Wall Street Week, Fox Business News & News 12. He's provided CPE & CLE continuing education credits to NYSBA, ABA, AICPA, NYSSCPA, & the Estate Planning Council.

Mr. Montag co-authored an American Bar Association Flagship publication, titled; 'The Advisors' & Trustees' Guide to Managing Risk." The Jan 2019 issue of Commerce Clearing House, referred to him as: "One of today's best brains in life Insurance."

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