

## Estate Planners Day 2017

Join EPCNYC for their Annual One-Day Professional Development & Networking Program, Estate Planners Day.

This premier event features industry leaders speaking on the current topics & trends.

Attendees also have time to mingle with our Sponsors & Exhibitors. Our exclusive exhibitor area hosts the firms and services that will help you provide the best services you can to your clients.

The full host of continuing education credits for the estate planning disciplines are applied for.

*It is an event not to miss!*

### Continuing Education Credits

The following credits are being applied for:

- ◆ Accountancy—CPE
- ◆ Banking—CTFA
- ◆ Financial Planning—CFP
- ◆ Legal—CLE
- ◆ Insurance

Breakfast with our Sponsors: 8:00 AM

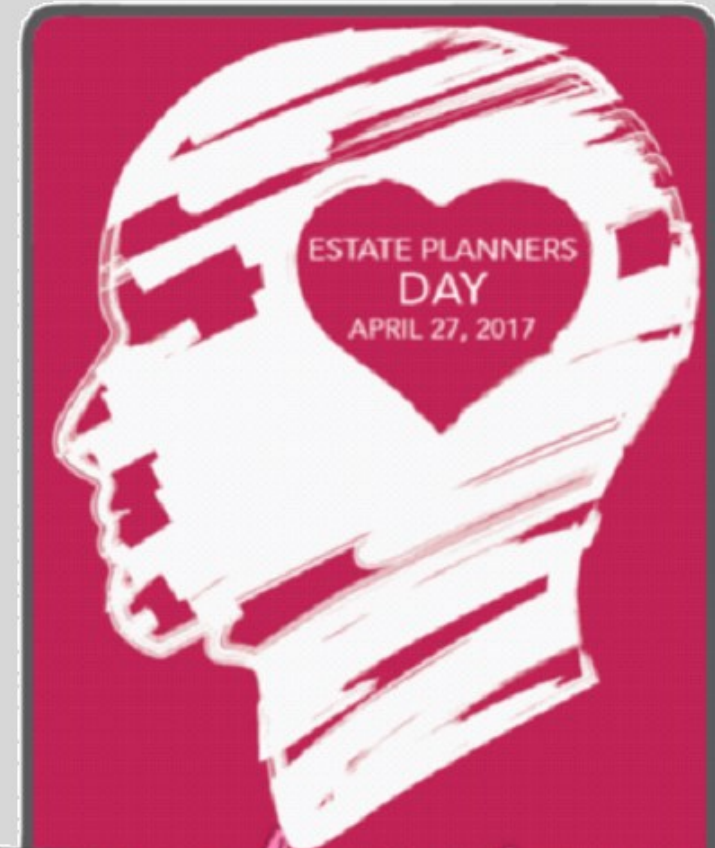
Programming: 8:45 AM—5:00 PM

Cocktails: 5:00 PM

Thursday, April 27th

8:00 AM - 6:00 PM

The Union League Club, NYC



*The Head and The Heart*



The Estate Planning Council of New York City Inc.

[epcnyc.com](http://epcnyc.com)

[epcnyc@caphill.com](mailto:epcnyc@caphill.com)

855.293.0784

## Presentations:

### **9 AM: Culture Eats Structure for Breakfast, Lunch, and Dinner**

**Speaker: Holly Isdale**

**Summary:** Peter Drucker's iconic observation has fueled countless debates in corporate boardrooms and MBA classrooms. It is time it became a mantra in the legal and planning realm as well. Too often as practitioners we fail to consider the broader capacity of families to manage the complex structures we create in pursuit of tax or financial planning, with often disastrous consequences. By designing systems to match the capacity of the family, by understanding and defining risks as well as solutions, we can ensure successful integration of structure with culture.

Holly Isdale will discuss strategies and approaches to integrate into your practice to ensure you are properly supporting your clients to achieve true success in managing their affairs.

### **10 AM: Planning For An Aging Population**

**Speaker: Bernie Krooks**

**Summary:** Many clients are more concerned about issues that may arise as they age as opposed to estate taxes which may (or may not) be due upon their death. With the enhanced estate tax exemption and the current political climate, more and more clients are of this

mindset. Mr. Krooks will discuss a variety of long-term care issues, including Medicare, Medicaid, and long-term care insurance, including relevant tax considerations. He also will discuss planning for retirement and possible incapacity, including Social Security benefits and advance directives.

### **11:05 AM: Split Dollar Again... In Light of the Morrisette Case**

**Speaker: David Weinstock**

**Summary:** Morrisette v. Commissioner paves the way for lump sum funding of non-equity collateral split dollar life insurance as a viable means to limit gift taxes but it may have much greater utility in overall estate planning. A 75% discount on assets transferred would provide substantial wealth transfer opportunities.

### **12:15 PM: The Financial Crisis, Its Causes & After Effects And Changes Under The Trump Administration**

**Speaker: Steven Eisman**

**Summary:** The proposed workshop will cover the causes of the financial crisis and the impact of Dodd-Frank on the financial industry and individual financial companies. It will also explain the changes that could possibly be made under the Trump Administration.

### **1:45 PM: Pixar for Estate Planners: Who Gets Your Digital Stuff When You've Logged Off for the Final Time**

**Speaker: Bob Kirkland**

**Summary:** As the number, complexity, types and value of digital property held by our clients increases, questions regarding the administration and disposition of such items are increasing as well. This presentation will define what is meant by digital property, and discuss the unique obstacles to estate planning for digital property (including federal and state law limitations). The presenter will describe recommended planning techniques for digital assets, and summarize the distinctive fiduciary administration issues involved with digital property.

### **2:50 PM: Estate Planning & Administration For Firearms**

**Speaker: Richard Ploss**

**Summary:** This presentation will focus on estate planning and administration for firearms (as defined under Federal law). The presentation will provide an overview of the law affecting firearms, including but not limited to Federal Law but also state law as well. We will also provide the attendees with an overview of how to advise Executors of decedent's estates and Trustees of trusts owning firearms with regard to the administration of firearms ("reactive

planning"). We will then examine how to advise a client with regard to estate planning for firearms ("proactive planning"). The presentation will include a discussion of the advantages and disadvantages of "Gun Trusts" as well as the current regulatory environment. If time permits, the presentation will include a question and answer session.

### **3:55 PM: Good Intentions Can Often Lead to Unintended Consequences**

**Panel: Andrew Grumet, Jacqueline Valouch, & Jeffrey Haskell**

**Summary:** For private foundations, trouble often falls under the category of "self-dealing," which can arise in the context of most business and financial transactions between a foundation and its disqualified persons or "insiders." In this scenario-based presentation, Jeffrey D. Haskell, J.D., LL.M., will review the many ways that insiders unknowingly self-deal or in which foundations inadvertently stumble, and the penalties and corrective action requirements associated with such activities. By being challenged to identify ambiguous instances of self-dealing and other unintentional but common compliance violations, participants will walk away with a grasp of the subject matter and an enhanced appreciation for the subtleties of private foundation oversight.