

INTERMEDIATE TRUSTS & ESTATES PLANNING

Thursday, October 3, 2019 | Albany (Webcast)
Friday, October 4, 2019 | Tarrytown
Friday, October 11, 2019 | NYC
Wednesday, October 16, 2019 | Rochester
Thursday, October 17, 2019 | Long Island

7.0 MCLE Credits (7.0 Areas of Professional Practice)

9:00 a.m. – 4:30 p.m.

PROGRAM AGENDA

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| 8:30 a.m. - 9:00 a.m. | Program Registration |
| 9:00 a.m. - 9:10 a.m. | Introductory Remarks |
| 9:10 a.m. - 10:00 a.m. | Update on the NYS Power of Attorney <ul style="list-style-type: none">• Statutory Gifts Rider• Review of litigation and potential legislation |
| | <i>(1.0 MCLE credit – Areas of Professional Practice)</i> |
| 10:00 a.m. - 10:50 a.m. | NYS Estate Tax Revisited <ul style="list-style-type: none">• Impact of Gifts• Drafting to Avoid the Tax Cliff• Drafting for Married Couples – portability and QTIP Issues• Drafting for the second step-up in basis |
| | <i>(1.0 MCLE credit – Areas of Professional Practice)</i> |
| 10:50 a.m. - 11:00 a.m. | Break |
| 11:00 a.m. - 12:15 p.m. | Estate Planning with IRAs |
| | <i>(1.5 MCLE credits – Areas of Professional Practice)</i> |
| 12:15 p.m. - 1:15 p.m. | Lunch |
| 1:15 p.m. - 2:05 p.m. | Where Estate Planning Meets Matrimonial Law |
| | <i>(1.0 MCLE credit – Areas of Professional Practice)</i> |

2:05 p.m. - 3:20 p.m.	Decanting Trusts <i>(1.5 MCLE credits – Areas of Professional Practice)</i>
3:20 p.m. - 3:30 p.m.	Break
3:30 p.m. - 4:20 p.m.	Estate Planning with Digital Assets <i>(1.0 MCLE credit – Areas of Professional Practice)</i>
4:20 p.m. – 4:30 p.m.	Question & Answer
4:30 p.m.	Adjournment