2019

Private Wealth & Taxation Institute

Continuing Professional Education Series

Presented by

Maurice A. Deane School of Law
Hofstra University
and
Meltzer, Lippe, Goldstein & Breitstone, LLP

Day 1 - June 5, 2019

Day 2 - June 6, 2019

Sessions run from 8:30am – 5:30pm

Maurice A. Deane School of Law at Hofstra University

Registration: $100 Per Person/Per Day
(in advance/non-refundable)
$120 Per Person/Per Day (at door)
(includes breakfast and lunch)

Limited seating. CLE/CPE Credit and Webinar available
Special Pricing for NCCPAP Members

Live program is transitional and appropriate for both experienced and newly admitted attorneys.
Webinar is non-transitional and appropriate for experienced attorneys only.
Financial Aid is available — for information please email
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RSVP by May 24, 2019
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WHO SHOULD ATTEND
Real Estate & Business Owners
Attorneys, CPAs
Financial Advisors

PROGRAMS HELD AT:
121 Hofstra University — Room 308
Hempstead, New York 11549
PLEASE SEE PAGE 15 FOR DIRECTIONS TO EVENT

Private Wealth & Taxation Institute Ltd. is a 501(c)(3) non-profit organization.

2019
Private Wealth & Taxation Institute

Schedule

AM SESSION

WEDNESDAY, JUNE 5 — 5.0 CLE/CPE

8:00 - 8:30	Breakfast and Sign In
8:30 - 8:40	Introduction to Program *Stephen M. Breitstone*
8:40 - 9:40	Deferring Gain on Sale—How does a CRUT Measure Up to a 1031 Exchange? *Stephen M. Breitstone, Jerome M. Hesch and Joy Spence*
9:40 - 9:50	Break
9:50 - 11:20	Working with the Latest Guidance Under Section 199A, 163(j) Regs and Section 461(l) *Robert S. Barnett, José L. Berra and Robert L. Goldfarb*
11:20 - 12:10	Opportunity Zones—A Tax, Business and Community Perspective *Michael Gershon, Julia Shin and Mark E. Wilensky*
12:10 - 1:00	S Corporations in Business Overseas—Planning for Global Intangible Low-Taxed Income “GUILTY” *Mark C. Peltz*
1:00 - 2:00	Lunch

PM SESSION

WEDNESDAY, JUNE 5 — 3.5 CLE/CPE

2:00 - 3:00	**UJA FEDERATION OF NY—BUD ROSNER LECTURE** Charitable Giving—Tax Motivated or Not? *Sandy J. Schlesinger*
3:00 - 4:00	U.S. Citizens and Long-Term Residents Out of the United States— Compliance Hurdles and Benefits of Expatriation for U.S. Citizens and Permanent Residents *Jerald D. August*
4:00 - 4:15	Break
4:15 - 5:15	Elimination of Workplace Bias—Recent New York State and City Legal Developments *Larry R. Martinez*

Question and Answer period will follow each topic

2019
PRIVATE WEALTH & TAXATION INSTITUTE

Schedule (Continued)

AM SESSION

THURSDAY, JUNE 6 — 4.5 CLE/CPE

8:00 - 8:30	Breakfast and Sign In	
8:30 - 8:35	Introduction to Program *Stephen M. Breitstone*	
8:35 - 9:45	Hot Topics in Estate Planning *Andrew L. Baron, Mitchell A. Drossman and Avi Z. Kestenbaum*	
9:45 - 10:45	Having Your Cake and Eating It Too! If You Give It Away, Can You Get It Back? *Gideon Rothschild*	
10:45 - 11:00	Break	
11:00 - 12:00	Surrogate Court Practice Update *David A. Bamdad, Eric W. Penzer and Hon. Margaret C. Reilly*	
12:00 - 1:00	Changing Irrevocable Trusts—A Roadmap to Decanting *David A. Bamdad and Mary P. O'Reilly*	
1:00 - 2:00	Lunch	

PM SESSION

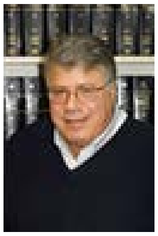
THURSDAY, JUNE 6 — 3.5 CLE/CPE

2:00 - 3:00	A Fresh Look at Business Succession Planning and Repatriating Offshore Earnings After Tax Reform *Steven M. Dane, Lawrence M. Lipoff and Bradley Mainguy*	
3:00 - 4:00	The Intersection Between Divorce and Estate Planning—What Every Planner Should Know *Avi Z. Kestenbaum and Christian A. Pickney*	
4:00 - 4:15	Break	
4:15 - 5:15	Ethics—Risk Management for the Tax Professional Advising Clients Who Push the Envelope *Lawrence S. Feld and Prof. Linda Galler*	

Questions and Answer period will follow each topic

PRIVATE WEALTH & TAXATION INSTITUTE FACULTY

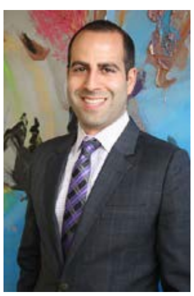
DIRECTOR



Stephen M. Breitstone – is a partner and chair of the Private Wealth & Taxation group at Meltzer, Lippe, Goldstein & Breitstone, LLP. He is the director of the Private Wealth & Taxation Institute. The Private Wealth & Taxation group includes both Tax, Trust & Estates and related disciplines . Steve handles domestic and international, income, estate and gift tax planning for high net worth individuals, closely held businesses and real estate owners; 1031 Exchanges, income taxation of corporate mergers and acquisitions; taxation of workouts and bankruptcies; federal, state and local tax procedure and controversies. Steve is on the advisory board of the New York University Institute on Federal Taxation and a Fellow of both the American College of Tax Counsel (ACTC) and the American College of Trusts and Estates Counsel (ACTEC). ***LL.M. Tax, NYU Law School; J.D.; Cardozo Law School, Law Review; NYU Stern School of Business; B.S. Accounting; Adjunct Professor at Cardozo Law School***

2019 FACULTY

Jerald D. August – Jerry focuses on advising clients on federal and state income tax matters, including transactional tax planning as well as tax controversies and litigation before the Internal Revenue Service. He works with clients in Manhattan and New York as well as in Philadelphia and the Greater Philadelphia metropolitan area as well as in Palm Beach County, Florida. In short, he has long enjoyed a national practice in matters involving federal and state taxation. In addition to New York, he is admitted to the Florida Bar and the Pennsylvania Bar. ***B.A., and B.S., Wharton School of the University of Pennsylvania; J.D., University of Pittsburgh School of Law***



David A. Bamdad – is a partner in the Private Wealth & Taxation group at Meltzer, Lippe, Goldstein & Breitstone, LLP. David focuses his practice on estate and trust litigation. In his practice, he regularly counsels fiduciaries and beneficiaries in contested probate, administration and accounting proceedings, discovery and turnover proceedings, and proceedings to remove fiduciaries. David was an Associate at a New York City law firm where he counseled clients in all phases of estate administration and litigation. ***B.A., Binghamton University; J.D, Hofstra University***

Robert S. Barnett – is a founding partner of Capell Barnett Matalon & Schoenfeld LLP, Attorneys at Law. His practice is highly concentrated in the areas of taxation, trusts, estates, corporate and partnership law and charitable planning. His experience includes Surrogate's Court practice, tax dispute resolution, and Tax Court representation. Mr. Barnett frequently assists clients in structuring financial transactions and charitable gifts. **J.D., Fordham University (cum laude), B.S., Hofstra University (magna cum laude)**

Andrew L. Baron – is counsel in the Private Wealth & Taxation Group at Meltzer, Lippe, Goldstein & Breitstone, LLP. Andrew's practice encompasses all phases of estate and income tax planning, business succession planning and estate and trust administration. His practice also includes working with closely held business owners in all phases of their activities, advising executors, trustees and beneficiaries in all aspects of estate and trust administration, and handling Surrogate's Court proceedings throughout the New York metropolitan area. ***LL.M. Taxation, NYU; J.D., Benjamin N. Cardozo School of Law; B.A., Yeshiva University***

José L. Berra – is tax counsel in the Private Wealth & Taxation group at Meltzer, Lippe, Goldstein & Breitstone, LLP. Prior to attending The University of Chicago Law School, José was a C.P.A. at Ernst & Young. Following his graduation, José returned home to practice tax law in the New York City office of Morgan, Lewis & Bockius where he first worked with Steve Breitstone. After four years at Morgan, Lewis, José moved to Paul, Weiss, Rifkind, Wharton & Garrison. José was an attorney advisor in the U.S. Dept. of Treasury. José also worked as an investment banker prior to joining Meltzer, Lippe. ***J.D., University of Chicago Law School; B.S., SUNY Albany***

Steven M. Dane – is a partner in the CohnReznick's tax practice and leads the firm's estate and trust practice in our Hartford office. He has more than 35 years of professional experience concentrating in tax matters for closely held businesses and their owners. Steve's experience includes the tax and financial aspects of forming, operating, and transitioning business entities, combined with estate and succession planning, and estate/trust administration services. Steve has also directed hundreds of business valuation engagements involving many different business types and industries including professional firms, manufacturers, distributors, wholesalers, retailers, and other types of service businesses. He has also provided arbitration and mediation services in several matters. ***University of Pennsylvania, Wharton School of Business: Bachelor of Science, Economics; University of Chicago: Master of Business Administration, Finance***

Mitchell A. Drossman – is managing director and head of National Wealth Strategies for the Chief Investment Office (CIO) within Bank of America's Global Wealth & Investment Management (GWIM) division. In this role, Mitchell manages and leads the Wealth Strategies Advisors to provide objective insight to help U.S. Trust, Bank of America Private Wealth Management clients align their financial and estate planning strategies with their goals by integrating the full capabilities of our investment and financial planning services and by utilizing the broad range of Bank of America Corporation and its affiliates**.** ***J.D. cum laude from Brooklyn Law School, where he served as Editor of the Law Review***

Lawrence S. Feld – Larry concentrates his practice in federal and state criminal and civil tax controversies and white collar criminal defense. Mr. Feld is a co-author of Tax Fraud and Evasion, a comprehensive two volume treatise on criminal and civil tax fraud and money laundering which is published by Thomson Reuters. He is an adjunct professor at New York Law School where he teaches an advanced seminar on criminal tax enforcement. ***J.D., Columbia Laws School, B.A., Queens College***

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Professor Linda Galler – is the Max Schmertz Distinguished Professor of Law at the Maurice A. Deane School of Law at Hofstra University. She has taught in the areas of individual income taxation, corporate taxation, international taxation, tax policy and ethics in federal tax practice. Professor Galler founded and directs the Hofstra Law School Federal Tax Clinic, in which faculty and law students represent low income taxpayers in disputes with the Internal Revenue Service and the New York State Department of Taxation and Finance. Professor Galler has more than thirty years of tax practice and counseling experience with Shearman & Sterling; Milbank, Tweed Hadley & McCloy; and Curtis, Mallet-Prevost Colt & Mosle. She is a frequent speaker on tax ethics and is the lead author of Regulation of Tax Practice, published by Carolina Academic Press. Professor Galler has chaired the Standards of the Tax Practice Committee and the Teaching Taxation Committee of the ABA Section of Taxation

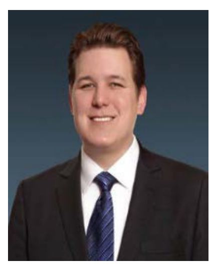
Michael Gershon – is a partner at Citrin Cooperman where he provides his clients, including high net worth individuals, family groups and closely held businesses, with income tax planning and compliance, business advisory services, succession planning, and wealth preservation planning. Michael joined the firm as a partner in September 2011 and works out of the firm's New York City office. For more than 20 years, Michael has focused on creating and implementing creative tax strategies for entrepreneurs and their companies operating in real estate and many other diverse industries. ***B.S., Computer Science, Northwestern University, Masters Taxation, Fordham University, MBA in Public Accounting, Fordham University***

Robert L. Goldfarb – is a senior advisor at Janover, LLC has twice been named as one of the Top 100 Most Influential People in Accounting by the highly regarded trade publication Accounting Today. With more than 35 years of accounting and advisory experience, Bob has long dedicated himself to providing prem- ier client service and to sharing his knowledge by mentoring and training junior staff whenever possible. He has appeared on television news, written several books on taxation updates, served as the technical editor of Clinton Administration Tax Legislation and is currently the Editor-in-Chief of the Journal of the CPA Practitioner. He is regularly called upon to speak at events for the American Institute of CPAs, many State Societies of CPAs and the National Conference of CPA Practitioners. ***Master of Arts, Business Education, Adelphi University, Master of Business Administration, Hofstra University, Bachelor of Business Administration degree, Pace University***

Jerome M. Hesch – serves as an income tax and estate planning consultant for lawyers and other tax planning professionals throughout the country. In addition, he is Special Tax Counsel to Oshins & Associates in Las Vegas Nevada, Dorot & Bensimon, in Aventura, Florida and Meltzer, Lippe, Goldstein & Breitstone, in Mineola, NY. He is the Director of the Notre Dame Tax and Estate Planning Institute, on the Tax Management Advisory Board, a Fellow of both the American College of Trusts and Estates Council and the American College of Tax Council. An accomplished author, he has published numerous articles, Tax Management Portfolios, and co-authored a law school casebook on Federal Income Taxation, now in its fourth edition. He was elected to the NAEPC Estate Planning Hall of Fame. ***Bachelor's and Master's degrees from the University of Michigan and his law degree from the University of Buffalo***

Avi Z. Kestenbaum – is a partner in our Private Wealth & Taxation group and co-chairs the Trusts and Estates group at Meltzer, Lippe, Goldstein & Breitstone, LLP, for which the firm is nationally ranked Tier 1 by U.S. News and World Report, and the chair of the Tax Exempt Organizations group. Avi provides creative and sophisticated domestic and international tax, estate planning, and asset preservation counsel to CEOs of major corporations, ultra-high net worth individuals, multinational businesses and large charitable organizations. He is often quoted in Forbes, The Wall Street Journal, USA Today, Investor's Business Daily, and other major publications, and is a prominent national lecturer and author in leading tax journals. He is also an Adjunct Tax Professor at Hofstra University School of Law, ACTEC Fellow, and is listed in Super Lawyers and Best Lawyers in America. Avi is a member of Trusts & Estates Magazine editorial and advisory board, where he is Chair of The Modern Practice Committee. ***LL.M., University of Miami School of Law; J.D., Brooklyn Law School; B.S., Touro College***

Lawrence M. Lipoff – is a director in CohnReznick LLP's tax practice and is based in the Firm's New York office. With more than 30 years of experience, Larry specializes in the delivery of domestic and international private client services to enable high net worth individuals and families to maximize their new or generational wealth. Larry provides strategic advice to his clients and their closely-held businesses in the areas of income tax planning and compliance, estate planning and administration services, consultation regarding formation of family trusts and philanthropic structures. Through his many years in practice he is able to synthesize the work of various related professionals and their firms and integrate several planning strategies into solutions that maximize value**.** ***Wharton School, University of Pennsylvania, Bachelor of Science, Economics***



Bradley Mainguy – is a manager in CohnReznick's International Tax Practice with more than six years of public accounting experience providing international tax services to clients in a wide range of industries, as well as individuals and publicly traded companies. Brad has extensive experience working with multinational corporate clients on consulting and compliance projects, including global business model optimization and restructuring projects from the design and feasibility stage through implementation. He also has expertise in U.S. tax issues relating to both inbound and outbound investments, as well as navigating the increasingly complex network of reporting, disclosure, and withholding requirements arising from doing business in a global economy. ***Florida Atlantic University: Bachelor of Business Administration, International Business and Trade, summa cum laude, William & Mary Law School: Juris Doctor, New York University School of Law: Master of Laws, Taxation***

Larry R. Martinez – is a partner and co-chair of the Labor and Employment practice group at Meltzer, Lippe, Goldstein & Breitstone, LLP where he represents management in a broad array of multi-state labor and employment matters. He has successfully defended private and public sector clients in federal and state courts as well as administrative tribunals including the New York State Division of Human Rights, the Massachusetts Commission Against Discrimination and the Connecticut Commission on Human Rights and Opportunities. Larry has also represented clients in mediations and arbitrations administered by the American Arbitration Association. Prior to joining the firm, Larry was employed at Littler Mendelson, P.C. where he represented clients in the health care and financial services industries in wage and hour and employment discrimination cases. ***J.D., Albany Law School of Union University; B.A., Wesleyan University***

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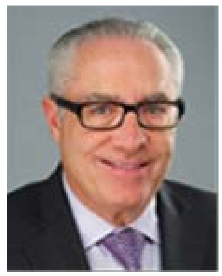
Mary P. O'Reilly – is a partner in the Private Wealth & Taxation group and co-chairs the Trusts and Estates group at Meltzer, Lippe, Goldstein & Breitstone, LLP. Mary assists individuals and families in the preservation and transfer of wealth and philanthropic planning. Her clients include family business owners, real estate developers, tax exempt organizations, investment bankers, private equity fund managers, physicians, inventors, entertainers, business professionals, retirees, non-resident aliens, domestic partners and those of inherited wealth. Mary's practice includes estate and trust administration. She represents executors in probating wills and administering estates and understands the delicate nature of losing a loved one and its impact on the estate administration process. She handles will contests, prepares and files estate tax returns, and represents fiduciaries in estate tax audits. ***LL.M., New York University; J.D., St. John's University School of Law, B.A., Binghamton University (cum laude)***

Hon. Margaret C. Reilly – is the judge of the Nassau County Surrogate's Court. Prior to becoming a judge, Reilly worked as a Deputy Nassau County attorney, the village prosecutor of Stewart Manor, a senior Associate of Mulholland Minion & Roe and a senior associate of the Law Office of Vincent D. McNamara. Judge Reilly is an active member of her community serving as a trustee of the Oyster Bay East Norwich Boys and Girls Club. She has been awarded the Fidelis Juri Award by the Fraternal Order of Court Officers in 2000 and the Fidelis Juri Award by the Nassau County Court Officers Benevolent Association in 2007.

Mark C. Peltz – is a principal at Mazars, he has more than 35 years of experience delivering domestic and international tax planning services to corporations and high-net-worth individuals. He represents clients before the Internal Revenue Service, the state and city of New York, and foreign taxing authorities. He negotiates foreign concession agreements, reviews foreign tax credit calculations, participates in cross border financing and bilateral transfer pricing agreements, and litigated and settled a major territorial tax issue in Hong Kong. Mark's expertise extends to corporate bankruptcy issues, and he played an integral role in a major corporate Chapter 11 filing, assisting in tax restructuring and pursuing recoverable tax benefits for the company. ***Mark graduated from Brooklyn College of the City University of New York. He received a Juris Doctor degree and a Master of Laws degree in Taxation from New York University School of Law***



Gideon Rothschild – is a partner with the New York City law firm of Moses & Singer LLP, where he co-chairs the Trusts & Estates and Wealth Preservation Group. He focuses his practice in the areas of domestic and international estate planning techniques for high net worth clients and is a nationally recognized authority on wealth preservation and offshore trusts. Mr. Rothschild is a Past Chair of the Real Property Trust & Estate Law Section of the American Bar Association, a Fellow of the American College of Trust and Estate Counsel and Academician of The International Academy of Trust and Estate Lawyers and a past Chair of the New York Chapter of the Society of Trust and Estate Practitioners (STEP***). New York Law School (J.D., with honors) Bernard M. Baruch College of the City University of New York (B.B.A.)***

Eric W. Penzer – is a partner at Farrell Fritz, PC and concentrates in trust and estate litigation. His practice includes contested probate proceedings, fiduciary accounting proceedings, discovery proceedings, and other litigation related to estates and trusts. He is a frequent contributor to Farrell Fritz's New York Trusts & Estates Litigation blog. Mr. Penzer is a Fellow of the American College of Trusts & Estates Counsel (ACTEC). He has an AV Preeminent Martindale-Hubbell Peer Review Rating. ***Fordham University School of Law, State University of New York at Stony Brook***

Sanford J. Schlesinger – is a founding partner of the law firm of Schlesinger Lazetera & Auchincloss LLP formerly Schlesinger Gannon & Lazetera LLP. Mr. Schlesinger is a nationally recognized expert in the areas of estate and tax planning, estate administration, family-owned business planning, charitable planning and all related areas. He also handles all aspects of contested and litigated estate, trust and related tax matters. Mr. Schlesinger is a fellow of the American College of Trust and Estate Counsel and is a past Downstate New York Chair and a former member of its Charitable Planning and Exempt Organizations Committee. He was Co-Chair of the NYU-SCPS 73rd Institute on Federal Taxation. New York City Bar (2013 through 2016), the Editorial Board of the New York State Bar Journal (Emeritus since 2006), Board of Directors of the New York State Bar. ***B.S. (with honors) from Columbia University and a J.D. in from Fordham University School of Law***

Christian A. Pickney – is the founder of the boutique matrimonial and family law practice, The Pickney Law Firm. Since 1996, Mr. Pickney has provided exceptional representation for his clients on Long Island and in New York City. Mr. Pickney is well-known for his success in representing high-net-worth individuals in complex cases involving sophisticated financial analysis and complex taxation issues. His cases have involved issues unique to high net-worth clients, including the protection of assets held in trusts, valuation of large corporations and valuation of substantial real estate interests, including the use of 1031 exchanges to maximize tax advantages for his clients. ***J.D. Touro Law School, B.A. Hofstra University***

Julia Shin – is a vice president of innovation and managing director of impact investing for Enterprise Community Investment, Inc., where she focuses on financial innovation and new capital relationships. Julia brings deep private sector experience to Enterprise, both as banker and a transactional lawyer. Before joining Enterprise in 2013, Julia was a derivatives banker at Citi where she structured index, fund and structured-note solutions for institutional and retail clients. Prior to Citi, she was an investment banker at Goldman Sachs where she structured financial instruments and solutions, and worked on new product development. Previous to her investment banking work, Julia worked as a corporate attorney in New York City at Cravath, Swaine & Moore and Covington & Burling, representing institutional clients with focus on mergers and acquisitions, securities law and banking law. ***Juris Doctor and Master of Arts in economics from the University of Chicago and received her undergraduate degrees from MIT***

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Joy Spence – is an associate in the Private Wealth & Taxation group at Meltzer, Lippe, Goldstein & Breitstone, LLP where she focuses her practice primarily on tax law, wealth management, and trusts and estates. She regularly assists clients in developing tailored plans to maximize asset protection and wealth preservation, while minimizing tax exposure. She also counsels individuals and families on developing tax-efficient structures and intra-generational wealth transfer strategies for estate, charitable, and business succession planning needs. **LL.M., University of Miami School of Law; J.D., Florida International University College; B.S., Appalachian State University**

Mark E. Wilensky – is a tax partner in the Private Wealth & Taxation group at Meltzer, Lippe, Goldstein & Breitstone, LLP. Prior to joining the firm Mark was a tax attorney in the New York City office of Roberts & Holland LLP for 12 years. A large part of Mark's practice involves advising clients looking to sell, exchange, lease, or refinance real estate and take advantage of the tax deferral opportunities offered by section 1031 exchanges, installment sales and long-term lease agreements. Mark is an Adjunct Professor at Cardozo School of Law. ***LL.M. Tax, New York University M.A., The University of Chicago; J.D., Columbia University; B.S., Johns Hopkins University***

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2019
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6th Annual Private Wealth & Taxation Institute ◆ June 5-6, 2019

CONTACT INFORMATION	SESSIONS

Please register for the session you would like to attend.

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☐ Day 1- June 5

☐ Day 2 –June 6

☐ Both Days

☐ Webinar Day 1-June 5

☐ Webinar Day 2-June 6

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☐ $200.00 ($240.00 at Door) Both Days Registration

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Please register by May 24TH
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WEBINAR INSTRUCTIONS:

1- Instructions for logging into the Webinar will be sent via email 2 days before program.
2- Course materials, affirmation and evaluation forms will be sent via email 2 days before program.

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While most may use GPS, *please* follow the directions below to properly guide you to the event location on the Hofstra campus:

From Meadowbrook Parkway heading north: Take Meadowbrook Parkway North to Exit M4, Hempstead Turnpike (Route 24) West (the sign will say, "Hempstead and Coliseum"). Stay on **Hempstead Turnpike** to **California Avenue** (which is the traffic light just before the 2nd covered walkway over Hempstead Turnpike and just after the **Dunkin' Donuts** on your left).

Make a left onto California Avenue. Go past the first stop sign on California Avenue. When you see **Au Bon Pain** on your **RIGHT**, continue past the restaurant. **Koppelman Hall is on your RIGHT.**

PARKING AT HOFSTRA

Parking is limited in front of Koppelman Hall. **Additional parking** is available behind Allan Todd Gittleson Hall on your left (across from Au Bon Pain).

To the students, alumni, faculty and staff of the Maurice A. Deane School of Law at Hofstra University, the law is not just something to be studied — it is to be lived. It informs our careers, our lives and our interactions with fellow citizens. It is the means by which we make an impact in the world. Courts, law firms and employers recognize the significance of a Juris Doctor (J.D.) from Hofstra Law, or a degree from our joint J.D./M.B.A. and J.D./M.P.H. programs, because they know our graduates are renowned for their legal knowledge, preparedness and poise.

Meltzer Lippe is a law firm combining the best features of small firms with lawyers from major Metropolitan law firms. It functions in a full range of business areas: tax, corporate, real estate, labor and employment, commercial litigation and social media and privacy law, as well as wealth planning for high net worth individuals and trusts and estates.

STEP is the worldwide professional association for those advising families across generations. STEP's mission is to help families plan their assets across generations by promoting high professional standards; educating professionals; connecting advisors and families globally; informing public policy; and acting in the public interest. For more information or to become a member of The Society of Trust and Estate Practitioners please visit our website www.step.org or contact Stacey Harris, STEP Long Island Coordinator at STEPLongisland@mlg.com

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