



ESTATE PLANNING COUNCIL EASTERN NEW YORK CHAPTER

Member Benefits

In addition to the networking and educational opportunities provided by Membership in the Estate Planning Council of Eastern New York, Inc., there are many services and resources exclusively available to Estate Planning Council Members including:

FREE SUBSCRIPTION TO LEIMBERG INFORMATION SERVICES, Inc.

As part of your membership, you receive a subscription to access the Leimberg Information Services, Inc. (LISD) website. Each EPCENY member is provided with a username and password to access the LISI database, which includes frequently issued newsletters on timely topics on a variety of planning topics and a variety of other useful information. **Annual Savings vs. regular \$28 per month subscription fee: \$336.** Please see the Member Benefits page of our website www.epceasternnewyork.org for more details.

TRUSTS & ESTATES MAGAZINE

Subscribe to Trusts & Estates at the low Estate Planning Council Member's price of just \$149 over 50% off the regular \$275 rate. Even if you already subscribe to the magazine you are eligible. A subscription to Trusts & Estates Magazine includes: The year-end Wealth Management Resource Guide; Unlimited Access to the Trusts & Estates online editorial archive; and Three monthly e-newsletters: (1) Fiduciary Litigation Update bringing you the results and impact of the latest cases against trustees; (2) Wealth Watch News reporting on federal and state government estate tax, retirement benefits, and life insurance reforms; and (3) The Trusts & Estates Technology Review examining high-tech resources for the trusts and estates practitioner. **Annual Savings vs. Regular Subscription Price: \$126.00. Visit: <http://members.naepc.org/admin/> to enroll and save.**

A complete list of Member Benefits can be found at www.epceasternnewyork.org by clicking on the Member benefits tab on in the left column of the website.

— *See reverse for our 2014-2015 Program Schedule* —

NAEPC Program:

Wednesday, August 13, 2014

3:00 pm - 4:00 pm ET

2014 Planning With 99 Year GRATs, 33 Year CLATs, and UPSPATS that are Ready To Go!

Turney P. Berry, JD, AEP® · Wyatt, Tarrant & Combs LLP

About the program:

This webinar will discuss three interesting planning ideas popular in 2014: the long-term GRAT that hopes to achieve estate reduction as interest rates rise, the long-term CLAT that hopes to achieve estate reduction because current interest rates are artificially low, and the "ready to go" UPSPAT that hopes to turn an ancestor's unused estate tax exclusion into an asset.

About the speaker:

Turney Berry is an estate planning attorney in Louisville, Kentucky who chairs the 26 attorney estate planning group of Wyatt, Tarrant & Combs, LLP. Turney writes and speaks frequently on estate planning matters across the country.

He is a former regent of ACTEC, a Uniform Law Commissioner, a member of the advisory committee of the Heckerling Institute on Estate Planning, and a trustee of the Southern Federal Tax Institute.

This is an intermediate – advanced program (advanced topics, simply explained!)

Registration Fees

- \$40 / Accredited Estate Planner® designee
- \$60 / member of the EPC of Eastern New York, Inc.
- \$100 / non-member
- \$250 / council meeting or group gathering

Continuing education credit will be available for Accredited Estate Planner® designees. In addition, a certificate of completion will be made available for those professionals who feel the program satisfies their continuing education requirements and are able to self-file. Register at: www.epceasternnewyork.org

EPC ENY 2014-15 Program Schedule

October 16, 2014 (Thursday)

BREAKFAST

Location: Wolferts Roost Country Club

Time: 7:30am reg, program: 8:00 to 10:00am (TWO hour program)

Topic: How to Work with the IRS: Strategies for Professionals Who Deal with the IRS

Speaker: Michael Gregory

January 7, 2015 (Wednesday)

DINNER

Location: Wolferts Roost Country Club

Time: 4:00pm reg, program: 4:30 to 6:10pm (TWO hour program)

Topic: NY Estate Tax Update

Speaker: Josh Rubenstein

March 24, 2015 (Tuesday)

LUNCH

Location: Wolferts Roost Country Club

Time: Reg/lunch: 11:30am, program 12:00 P.M.-2:00P.M (TWO hour program)

Topic: Affordable Care Act

Speaker: Michael Kitces

May 5, 2015 (Tuesday)

Location: Wolferts Roost Country Club

Time: TBD

Topic: TBD

Directions to **Wolferts Roost Country Club**, 120 Van Rensselaer Boulevard, Albany, NY 12204:

<http://www.wolfertsroost.com>

If you are using a **GPS** to locate Wolferts Roost:

Select Albany, NY as the city, then enter "1 Bob Smith PGA Drive" as the street. This will take you to the Clubhouse. Alternatively, use the intersection of Van Rensselaer Boulevard and Bob Smith PGA Drive as a locator.