

Please join us for our first meeting of the New Year!

**A Two-Part Look at 2010:
Planning Update & Roth IRA Conversions**

with

Blanche Lark Christerson, J.D., LL.M.
Managing Director,
Deutsche Bank Private Wealth Management

We are pleased to announce that **Blanche Lark Christerson** will be the guest speaker at our January 12th dinner program. The timing could not be better for Blanche to share with us her extensive expertise in two extremely timely, topical issues for planners as we begin the New Year.

Part I will provide a planning update: where we may or may not be with respect to the estate tax and wealth planning, and an update on any regulatory, judicial or administrative developments of interest.

Part II will discuss "limitless" Roth IRA Conversions, which begin next year. We will highlight some of the pros and cons surrounding conversions, and issues (and pitfalls) to be aware of in discussing this important new opportunity with clients.

About Our Speaker

Blanche Lark Christerson, Managing Director, Deutsche Bank Private Wealth Management, works with clients and their advisors to help develop appropriate planning strategies. She is also the author of *Tax Topics*, a regular commentary on current legislation and other tax issues. Prior to joining Bankers Trust Company (now Deutsche Bank) in 1997, she was in the estate planning department at U.S. Trust for 10 years, and had primary editorial responsibility for *Practical Drafting*, the estate planning publication. Ms. Christerson lectures to various planning and professional organizations nationwide, and is a frequent source for the media. She received her B.A. from Sarah Lawrence College, her J.D. from New York Law School and her LL.M. in taxation from New York University School of Law. Ms. Christerson is a member of the New York State Bar Association, the Bar of the City of New York and the American Bar Association, and is also the president of the Bagby Foundation for the Musical Arts.

Meeting Cancellation Policy

If we must cancel this meeting, an email will be sent to all registrants for whom we have an email address. If you are unable to check your email, call 877-817-8400 and the announcement will clearly indicate whether it is cancelled. Except in unusual circumstances, we would know about the cancellation at least 3-5 hours before the meeting. If you should need to cancel, let us know by 4 pm on Friday, January 8th. There will be a \$30 charge if you do not cancel and do not attend.

**Dinner Meeting
at a Glance**

Tuesday, January 12, 2010
5:00 p.m. Registration/Networking
5:30 p.m. Program Begins
(dinner included)

**ADVANCE REGISTRATION
IS STRONGLY ENCOURAGED!**

Antonees (The Elk's Club)
115 North Broadway, White Plains, NY
For directions, visit our website at
www.fpaghv.org.

Note re parking: If no space is available in the parking lot, please park either in front of Antonees alongside the curb or on the side street directly across from Antonees.

IMPORTANT NOTE RE CREDITS:
This program has been accepted by CFP Board of Standards, Inc. for 2 hours of continuing education credit.

To receive credit, please come prepared to sign in & out and provide your CFP® REGISTRANT ID and/or the LAST 4 DIGITS OF YOUR SSN #.

To Register:

E-mail your reservation to
office@fpaghv.org
or call Bonnie Stanley at 877-817-8400
or pay by credit card online at our FPA Store: <http://www.fpaghv.org/store/Shop-FPAGHV.html>.

Dinner Meeting Fees:

FPA of Greater Hudson Valley & FPA of CT:
\$45 Advance - \$55 at door, space permitting

Please Note: Season Pass holders must also register in advance.

Other FPA Chapters, the NYSSCPA & other Non-Members:
\$55 Advance - \$65 at door, space permitting

If paying at the door, check or cash only.
(space permitting)

**Invite your colleagues!
Remember, first-time guests
are welcome to attend for free!**

**OUR THANKS TO
OUR PARTNERS
FOR
SUPPORTING
OUR CHAPTER!**

PLATINUM



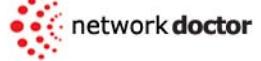
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If you do not wish to receive future e-mails from us, please submit your request to lori@fpaghv.org.
Thank you.