

March Dinner Meeting Notice

Dinner Meeting at a Glance

Tuesday, March 9, 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
[Click here](#) for directions.

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:

The first presentation has been submitted to CFP Board of Standards for 1 hour of continuing education credit; second presentation has been submitted for one hour of CFP and NY/CT INSURANCE continuing education credit.

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

To Register:

E-mail your reservation to office@fpaghv.org or call Lori Somerville at 877-817-8400 or pay by credit card online at our [FPA Store](#).

Dinner Meeting Fees:

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

Season Pass Holders:

While there is no additional fee for this meeting, your RSVP is required.

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!

Estate Planning in the Current Economic, Interest Rate & Changing Legal Environment & Financial Planning Using Trusts

Our first presenter, **Neil R. Lubarsky, JD, LL.M.**, will address the matters that should be considered when engaging in estate planning in the face of today's uncertainty, as well as how the law, including the new carryover basis rules, applies to someone dying in 2010. The possible use of GRAT's, QPRT's, family partnerships, and exemptions/ exclusions tied to state exemption amounts will be examined, as will the importance of the proper titling of property. The implications and reasoning behind the New York Power of Attorney law passed in 2009, as well as the concept of treating in-laws as outlaws, estate tax deferral issues, new Roth IRA concerns, issues related to computer passwords, and various elder law related issues, will also be touched upon.

Next up will be **Richard E. Austin, J.D., LL.M., CIMA, CRPC, Director of Financial Advisory Services, Sagemark Consulting**, who will cover the use of numerous trusts and life insurance to accomplish various financial planning objectives dealing with income tax, estate tax, gift tax, generation-skipping transfer tax, and asset and family protection.

About Our Speakers

Neil R. Lubarsky, an estate planning, elder law, and tax attorney with offices at 2900 Westchester Avenue in Purchase, NY, earned his Bachelor's Degree in Economics from Columbia University in 1977, received his law degree from Harvard University in 1980 and his Masters of Law in Taxation (LL.M.) from N.Y.U. in 1984, and has been engaged in the practice of law for over twenty-nine years. He is admitted to the bar in both New York and Connecticut.

Mr. Lubarsky is a frequent lecturer for various continuing education programs designed for attorneys, certified public accountants, financial planners, and laypersons. He has lectured for both the New York State Bar Association and the Westchester County Bar Association on Estate Planning and Elder Law matters. He has also taught various continuing professional education courses on Estate Planning, Elder Law and Tax matters for both the New York State Society of C.P.A.'s and the New York State Society of Life Underwriters.

Mr. Lubarsky has served as an editor and columnist on estate planning and elder law matters for *Westchester 60+*, a newspaper published by Westchester County. He also served as an instructor for the Harvard International Tax Program. His articles have been published in various estate planning and tax-oriented publications, including the *C.P.A. Journal*. For many years, Mr. Lubarsky served as Director of Education for the Westchester/Rockland branch of the International Association for Financial Planning. Mr. Lubarsky is currently an active member of the New York State, Westchester County, and Fairfield County Bar Associations and the National Academy of Elder Law Attorneys.

Richard Austin joined Sagemark Consulting in April 1999 as a Regional Director of Financial Planning. He has since advanced to other national and regional director positions. Richard concentrates on advising high networth clients, with an average net worth over \$20 million dollars, on investment, estate, charitable and business planning design alternatives. Clients include Fortune 500 executives and owners of successful, closely-held businesses. He has researched tax strategies for clients and worked closely with their advisors on design and implementation.

Before joining Sagemark, Richard was a staff attorney specializing in tax issues and financial analysis. He was also an attorney in private practice. In addition to working directly with clients, Richard has also conducted seminars for financial professionals, served on advisory boards, created computer models to calculate tax implications and authored articles on tax strategies. He received his LL.M. in Taxation from New York University, his JD *cum laude* from Pace University School of Law, and his BA *cum laude* from Pace University.

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, March 5th. There will be a \$30 charge if you do not cancel and do not attend.

Our Thanks to our Platinum Partner for Supporting our Chapter!



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