

2017

# PRIVATE WEALTH & TAXATION INSTITUTE

Continuing Professional Education Series

**PRESENTED BY**

**MAURICE A. DEANE SCHOOL OF LAW  
HOFSTRA UNIVERSITY**

**AND**

**MELTZER, LIPPE, GOLDSTEIN & BREITSTONE, LLP**

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Day 1 - May 24, 2017

Day 2 - May 25, 2017

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Sessions run from 9:00am – 5:30pm

**Maurice A. Deane School of Law at Hofstra University**

Registration: \$60 Per Person/Per Day (in advance/non-refundable)

\$75 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

sharris@meltzerlippe.com

RSVP by May 15, 2017  
events@meltzerlippe.com

**SPECIAL FEATURE ON DAY 1**

**UJA “BUD ROSNER LECTURE ON PLANNED GIVING”**

**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 8 FOR DIRECTIONS TO EVENT

# 2017

## PRIVATE WEALTH & TAXATION INSTITUTE

### Schedule

WEDNESDAY, MAY 24 AM SESSION 3.5 CLE/CPE

- 8:00 – 8:30 Breakfast and Sign In
- 8:30 – 8:45 Introduction to Program  
*Stephen M. Breitstone*
- 8:45 – 10:15 Private Wealth Planning for the Changing Environment and Tax Reform  
*Stephen M. Breitstone, Professor Jerome M. Hesch, Sharon L. Klein and Paul S. Lee*
- 10:15 – 10:30 Break
- 10:30 – 12:00 “So You Want To Be a Trustee?” Discussion of Risks and Goals for the Non-Institutional Fiduciary: What Alternatives Should Be Considered? Use of Private Trust Companies and Other Cutting Edge Solutions  
*Al W. King, III*
- 12:00 – 1:00 Lunch

WEDNESDAY, MAY 24 PM SESSION 5.0 CLE/CPE

- 1:00 – 2:30 **UJA Bud Rosner Lecture**-Planned Giving-Incorporating Philanthropy into your Life and Estate Plan  
*Sanford J. Schlesinger*
- 2:30 – 3:45 Fiduciary Accounting A to Z  
*Robert S. Barnett, Ilene S. Cooper, Jason J. Smith and Christopher D. Wright*
- 3:45 – 4:00 Break
- 4:00 – 5:30 Fiduciary Risk Assessment-How to Avoid the Law of Unintended Consequences  
*Jerald D. August*

Question and Answer period will follow each topic

# 2017

## PRIVATE WEALTH & TAXATION INSTITUTE

*Schedule (Continued)*

### AM SESSION

THURSDAY, MAY 25

3.5 CLE/CPE

- 8:00 – 8:30 Breakfast and Sign In
- 8:30 – 8:45 Introduction to Program  
*Stephen M. Breitstone*
- 8:45 – 9:45 Tax Planning For Real Estate-Is Real Estate Still the Favored Child Of the Tax Code?  
*Stephen M. Breitstone, Robert N. Brown, David E. Kahen and Mark E. Wilensky*
- 9:45 – 10:45 “Hiding the Ball” Anonymity, Tax Law and the U.S. as the World’s Favorite New Tax Haven  
*Prof. Alan I. Appel, Assistant US Attorney Sarah E. Paul and Leonard Schneidman*
- 10:45 – 11:00 Break
- 11:00 – 12:00 The Facts About the Long Term Care Dilemma  
*Natalie Karp and Rona Loshak*
- 12:00 – 1:00 Lunch

### PM SESSION

THURSDAY, MAY 25

4.5 CLE/CPE  
(2 in Ethics)

- 1:00 – 2:10 Practitioners Surrogate Court Update-Hear from Nassau and Suffolk Surrogate’s Court Experts  
*Hon. John M. Czygier, Jr., Hon. A. Gail Prudenti and Jason J. Smith and Sally M. Donahue*
- 2:10 – 3:00 Where Tax Exempts and For Profit Enterprises Intersect-A Discussion of the Tax and Legal Parameters-Applications to Health Care and to the Emerging Technologies  
*José L. Berra, Stephen M. Breitstone and Marianna Schwartzman*
- 3:00 – 3:15 Break
- 3:15 – 4:15 Ethics Part I- Business Succession Planning – Practical Tax, Financial and Ethical Considerations  
*Professor Linda Galler, Avi Z. Kestenbaum and Mary P. O’Reilly*
- 4:15 – 5:15 Ethics Part II- Did you see “60 Minutes” Exposé on Attorney’s Advising Clients on Ethically Challenging Events? How to Avoid Compromising Your Ethics and Your Freedom  
*Stephen M. Breitstone and Professor Linda Galler*

Questions and Answer period will follow each topic

# PRIVATE WEALTH & TAXATION INSTITUTE FACULTY

## DIRECTOR



**Stephen M. Breitstone** – is a partner and Vice Chairman of Meltzer Lippe, Director of the Private Wealth & Taxation Institute, Chair of the Private Wealth & Taxation Group at Meltzer Lippe and STEP Long Island's Co-Chair. The Private Wealth & Taxation Group includes both the Tax Group and Trust & Estates Group. 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 Institute on Federal Taxation and a Fellow of the American College of Tax Counsel. LL.M. Tax, NYU; J.D., Cardozo School of Law; Adjunct Professor at Cardozo School of Law.

## 2017 FACULTY



**Professor Alan I. Appel** – is a professor at New York Law School. He specializes in international and domestic tax planning involving taxation of mergers and acquisitions, partnerships, joint ventures, limited liability companies and tax controversy matters. Prior to joining New York Law School, he spent 13 years in the New York office of Bryan Cave LLP. LL.M., NYU, J.D., New York Law School.



**Robert N. Brown CPA, CGMA** - Robert has spent more than 35 years in public practice serving small to middle market companies and individuals in the areas of tax preparation, tax planning, tax controversy, estate planning, multi-state taxation, tax representation, financial statement preparation and management advisory services. Mr. Brown currently serves as president of the Nassau Suffolk Chapter of the National Conference of CPA Practitioners. He is a member of the American Institute of Certified Public Accounts, the AICPA Private Companies Practice Section, the New York State Society of Certified Public Accountants, and the National Conference of CPA Practitioners.



**Jerald D. August** – is a partner at Kostelanetz & Fink, LLP. 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 (2011), he is admitted to the Florida Bar (1977) and the Pennsylvania Bar (1980). B.A., and B.S., Wharton School of the University of Pennsylvania; J.D., University of Pittsburgh School of Law.



**Ilene Sherwyn Cooper** - partner at Farrell Fritz, P.C., is an estate litigator practicing in Surrogate's Courts throughout New York and the author of several legislative amendments affecting the laws of inheritance in New York. She has extensive experience administering decedents' estates, drafting and executing wills and trust instruments, powers of attorney, healthcare proxies and living wills. Previously, she worked as a Principal Law Assistant/Referee for the Surrogate of Suffolk County, Hon. Ernest L. Signorelli. Ilene has held leadership roles with many state and local professional and community organizations. This includes serving as chair of the New York State Bar Association's 5,000+ member Trust and Estates Law Section, as a member of the New York State Bar Association's House of Delegates, as president of the Suffolk County Bar Association, and as a Fellow of the American College of Trust and Estate Council (ACTEC). She is also an adjunct professor at Touro College Jacob D. Fuchsberg Law Center. B.A. Cornell University; J.D., Hofstra University School of Law.



**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 in both Federal and State jurisdictions, and Tax Court representation. Mr. Barnett frequently assists clients in structuring financial transactions and charitable gifts. B.S., Hofstra University, (*magna cum laude*); J.D. Fordham University, (*cum laude*).



**Hon. John M. Czygier, Jr.** – Judge of the Surrogate's Court, Suffolk County was admitted to practice law in New York State in 1975. After serving as a prosecutor in the Suffolk County District Attorney's office, he entered private practice and, for 25 years, concentrated in estate administration and estate litigation in the New York metropolitan area. He is a member of the Suffolk County Bar Association, where he served as Director, Chair of the Surrogate's Court Committee and Co-Chair of the Bench Bar Committee. J.D., Hofstra University School of Law.



**José L. Berra** – is counsel to the Private Wealth & Taxation Group at Meltzer Lippe. Prior to attending The University of Chicago Law School, José was a C.P.A. at Ernst & Young. After four years at Morgan, Lewis, José moved to Paul, Weiss, Rifkind, Wharton & Garrison. José served as an attorney advisor at the U.S. Dept. of Treasury, Office of Tax Policy. As a tax lawyer, José structured and negotiated domestic and cross-border corporate and partnership transactions, including, mergers and acquisitions, special allocation partnerships, financings and leases. He also engaged in related controversy work before the Internal Revenue Service. B.S., State University of New York at Albany; J.D., The University of Chicago Law School.



**Sally M. Donahue** - is a partner at Jaspas Schlesinger LLP in the Trusts and Estates practice group. Ms. Donahue concentrates in Surrogate's Court litigation, an area in which she has more than twenty years of experience. She also handles Trusts and Estates planning and administration and Guardianships. Ms. Donahue was a Court Attorney-Referee at the Nassau County Surrogate's Court from 2006 to 2011. Additionally, she practiced for many years at two prestigious law firms on Long Island in the areas of Trusts and Estates, Guardianships and Commercial Litigation. Ms. Donahue is a member of the New York State Bar Association for which she currently serves as a Co-Chair of the Long Section of the Guardian Ad Litem Committee and she is a member of the Nassau County Bar Association where she has been appointed Co-Chair for the 2016-2018 term for the Trusts and Estates Committee. B.A., Adelphi University; J.D., Touro College Jacob D. Fuchsberg School of Law.

## PRIVATE WEALTH & TAXATION INSTITUTE FACULTY



**Professor Linda Galler** - is Professor of Law at the Maurice A. Deane School of Law at Hofstra University. She is the lead author of "Regulation of Tax Practice," published by Carolina Academic Press as part of its Graduate Tax Series, and is a former chair of the ABA Tax Section's Standards of the Tax Practice Committee. Professor Galler also is Senior Tax Counsel to the New York City law firm Curtis, Mallet-Prevost, Colt & Mosle, where she consults in the areas of international taxation, corporate taxation, administrative practice and court procedure. Professor Galler has chaired the Standards of the Tax Practice Committee and the Teaching Taxation Committee of the ABA Section of Taxation. She is a member of the Academic Advisory Board of The Theodore Tannenwald, Jr. Foundation for Excellence in Tax Scholarship. B.A., Wellesley College; J.D., Boston University; LL.M., New York University.



**Avi Z. Kestenbaum** - is a partner of the Private Wealth & Taxation Group at Meltzer Lippe and co-chairs the Trust & Estates Group. Avi provides creative and sophisticated domestic and international, income, estate and gift tax planning for high net worth individuals, closely held businesses and real estate owners; business succession and asset preservation planning; charitable, philanthropic and tax exempt organizations. Avi is an ACTEC Fellow and listed in Super Lawyers and Best Lawyers in America and an Adjunct Professor at Hofstra University School of Law. He is a prominent national lecturer for and to prestigious professional organizations including, but not limited to, the "NYU Tax Institute," the "Notre Dame Tax and Estate Planning Institute," "New York State Bar Association," "Ed Slott's Master Elite Program," the "American Bar Association," "Trust and Estates Magazine," "The American Bankers Association," "Estate Planning Council of New York" and "New York State CPA Society, Annual Estate Planning Conference," "STEP," and several national insurance companies and nonprofit institutions. B.S., Touro College (*summa cum laude*); J.D., Brooklyn Law School; University of Miami; J.D., Brooklyn Law School.



**Professor Jerome M. Hesch** - serves as a Tax and Estate Planning Consultant for lawyers and estate planning professionals throughout the country and acts as Special Tax Counsel to Oshins & Associates in Las Vegas Nevada and Meltzer Lippe. He is the Director of the Notre Dame Tax and Estate Planning Institute, on the Tax Management Advisory Board, a member of the American College of Trusts and Estates Council (ACTEC) and the American College of Tax Council. He has published numerous articles, Tax Management Portfolios, and co-authored a law school casebook on Federal Income Taxation, now in its fourth edition. J.D., State University of New York at Buffalo.



**Al W. King III** - is based in New York City and the Co-Founder, Co-Chairman and Co-Chief Executive Officer of South Dakota Trust Company, LLC (SDTC), South Dakota Planning Company, LLC (SDPC) and the Estate Planning Institute (EPI). South Dakota Trust Company is a national trust boutique for the wealthy based out of Sioux Falls, South Dakota serving clients nationally and internationally. Mr. King was previously Managing Director and National Director of Estate Planning for Citigroup. Mr. King was also the Co-Founder and Vice Chairman of Citicorp Trust South Dakota. Mr. King also previously served as Director of Financial and Estate Planning for Coopers and Lybrand in Stamford, Connecticut. Prior to joining Coopers and Lybrand, Mr. King was a Vice President and Director of Financial and Estate Planning with Shawmut Bank and the Northeast Director of Financial and Estate planning for Prudential-Bache Securities.



**David E. Kahen** - is a partner at Roberts & Holland LLP. David has concentrated on corporate, partnership and real estate taxation, as well as executive compensation for more than 20 years. He has structured acquisitions and sales of businesses through asset and stock transfers; planned and executed tax-free reorganizations, spin-offs and other distributions of stock; advised on like-kind exchanges of property and other real estate transactions; and designed and implemented complex joint ventures. He is a member of the Tax Section of the New York State Bar Association and of the S Corporation Committee of the ABA Section of Taxation. He is co-author of a bi-monthly column on corporate taxation in the New York Law Journal. He received a B.A. from Yale and his J.D. from Columbia, where he was a Stone Scholar and an editor of the Law Review.



**Sharon L. Klein** - Sharon is President of the Tri State Region for Wilmington Trust, N.A., responsible for overseeing all Wealth Advisory Services. Sharon leads a team of professionals who provide planning, trust, investment management, family governance and education, family office, and private banking services. Sharon has over 25 years of experience in the wealth advisory arena and is a nationally recognized speaker and author. She has spoken for many professional organizations, including the Heckerling Institute on Estate Planning, the New York University Institute on Federal Taxation, the Notre Dame Estate Planning Institute, the Duke University Estate Planning Conference, and the Bloomberg BNA Tax Management Advisory Board. Sharon is frequently featured or quoted in publications such as The Wall Street Journal, The New York Times, The New York Law Journal and Trusts & Estates Magazine.



**Natalie Karp MBA, CLTC and Rona Loshak, MBA, CLTC** are highly accredited, award winning specialists in LTC Insurance and ranked by The American Association of Long Term Care Insurers as top professionals in New York State and Nationally ranked since 2009. In 2014, they were selected as a Goldman Sachs 10,000 Small Business and Long Island Achievers' Honorees 2015. Karp Loshack LTC Solutions is a trusted source of information on Long Term Care Insurance for individuals, business owners, and employer groups. Exclusively focused, their expertise includes traditional (stand-alone) Long Term Care Insurance policies, Hybrid Life/LTC plans, Life with LTC riders, financing LTC Insurance, and providing LTC Insurance with tax and estate advantages. The duo is well regarded for their educational platform and consultative approach. Recognized as a resource by the Wall Street Journal and Newsday for their expertise on long term care insurance, Karp Loshak LTC Insurance Solutions provides valuable advice to consumers and professional advisors.



**Paul S. Lee** - is a Managing Director and Senior Regional Wealth Advisor with The Northern Trust Company. Prior to joining Northern Trust, he was at Bernstein Global Wealth Management as National Managing Director, and a partner in the Atlanta-based law firm of Smith, Gambrell & Russell, LLP. Mr. Lee was the recipient of the Georgia Federal Tax Conference Award for Outstanding Tax Student and the Ernst & Young Award for Tax and Accounting. Mr. Lee is a Fellow of the American College of Trusts and Estate Counsel. In 2014, Mr. Lee was inducted into the NAEPC Estate Planning Hall of Fame®, and designated an Accredited Estate Planner® (Distinguished). A frequent lecturer and panelist on investment planning, tax and estate planning, Mr. Lee has spoken at the Heckerling Institute on Estate Planning, ACTEC National Meeting, Southern Federal Tax Institute, USC Institute on Federal Taxation, Southern California Tax & Estate Planning Forum, Notre Dame Tax and Estate Planning Institute, AICPA National Tax Conference, and the AICPA Advanced Estate Planning Conference. Mr. Lee co-authored the law review article, "Retaining, Sustaining and Obtaining Basis," which was awarded Outstanding Law Review Article in 2016 by the Texas Bar Foundation.

## PRIVATE WEALTH & TAXATION INSTITUTE FACULTY



**Mary P. O'Reilly** - is a partner in the Private Wealth & Taxation Group at Meltzer Lippe. 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. B.A., Binghamton University (*cum laude*); J.D., St. John's University School of Law, LL.M., New York University.



**Leonard Schneidman** - Managing Director of Andersen Tax, has over 40 years of experience in international taxation. His work includes counseling clients on structuring and operation of private investment funds, advising high net worth foreign investors on U.S. investments and activities, helping U.S. and non-U.S. corporate clients with tax-efficient structuring of their business operations, and advising clients on the reporting of undisclosed income and/or foreign financial assets from offshore accounts through the IRS Offshore Voluntary Disclosure Program (OVDP) or Streamlined Filing Compliance Procedures, and Report of Foreign Bank and Financial Accounts (FBAR).



**Sarah E. Paul** - is an Assistant United States Attorney in the Southern District of New York. Prior to joining the U.S. Attorney's Office, Sarah worked in private practice at the boutique firm of Spears & Imes, LLP, where she handled white collar criminal and civil litigation, and at the firm of Cravath, Swaine & Moore, LLP, where she handled complex civil litigation. Since last August, Sarah has served as the Tax Coordinator for all tax cases in the Southern District of New York. B.A., Cornell University; J.D. New York University School of Law.



**Marianna Schwartzman** - is an associate in the Private Wealth & Taxation Group at Meltzer Lippe. Prior to joining Meltzer Lippe, Marianna practiced law at the New York City law firm of Katten Muchin Rosenman LLP, where she focused her practice on estates and trusts administration and domestic estate planning for high net worth individuals. Marianna continues to practice in all aspects of personal representation of individuals and families, as well as representation of fiduciaries. She successfully administers estates of significant volume and complexity, including probate and post-mortem tax elections and allocations. Marianna specializes in advising fiduciaries and families through all the stages of estates and trusts administration. B.A., Hunter College, (*with honors*); J.D., Fordham University School of Law.



**Hon. Gail A. Prudenti** - On January 1, 2017 Judge A. Gail Prudenti was appointed Interim Dean of the Maurice A. Deane School of Law at Hofstra, where she also serves, as of September 1, 2015, as the Executive Director of the Center for Children, Families and the Law. Prior to her current position at Hofstra, Judge Prudenti distinguished herself as a well-respected jurist and hands-on administrator throughout a judicial career that lasted more than two decades. Most recently, she served as the Chief Administrative Judge of the courts of New York State, having been appointed by Chief Judge Jonathan Lippman on December 1, 2011. As Chief Administrative Judge, she supervised the administration and operation of the statewide court system, with a budget of over \$2.7 billion, 3,600 state and locally paid Judges and 15,000 non-judicial employees in over 350 court facilities.



**Jason J. Smith** - is a partner in the Private Wealth & Taxation Group at Meltzer Lippe. Jason focuses his practice on estate planning, asset protection, estate and trust administration and litigation. Jason's estate planning practice includes assisting individuals and families with tax-efficient and practical estate and gift planning, including the preparation of wills, revocable living trusts, insurance trusts and qualified personal residence trusts, grantor retained annuity trusts and dynasty trusts. He also counsels clients on asset protection strategies, including the use of trusts and the preparation of prenuptial agreements. His estate and trust administration practice dovetails with his trusts and estates litigation practice, where he advises clients in contested will and probate proceedings, fiduciary removal proceedings, trust construction cases, contested accountings proceedings, discovery and turnover proceedings and conservatorships and guardianship matters. Jason's trusts and estates litigation practice is augmented by his prior experience representing clients in complex commercial, class action, intellectual property and medical malpractice cases at the trial and appellate levels in both federal and state courts. B.S., New York University (*magna cum laude*); J.D., Yale Law School.



**Sanford J. Schlesinger** - Sanford ("Sandy") J. Schlesinger is a founding partner of the law firm of 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. J.D., Fordham University, B.S. (with honors), Columbia University.



**Mark E. Wilensky** - is a partner in the Private Wealth & Taxation Group at Meltzer Lippe. 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. B.S., Johns Hopkins University, M.A., The University of Chicago; J.D., Columbia University; LL.M. Tax, New York University.



**Christopher D. Wright, Esq., CPA**, is a Senior Tax Manager at Marks Paneth LLP. He works exclusively in the trust, estate and gift tax arena. In addition, he advises fiduciaries on estate and trust administration issues, including informal and formal fiduciary accountings. With over 30 years of accounting and taxation experience, Mr. Wright began his career with Arthur Anderson & Co. in both the Portland, Oregon and New York offices. Immediately prior to joining the firm in 2014, he had his own law and accounting practice based in Portland Oregon, which focused primarily on the needs of business owners and estate planning. Mr. Wright has devoted much of his career to the tax and estate planning issues that are unique to same sex couples.

# 2017 PRIVATE WEALTH & TAXATION INSTITUTE

Registration Form – Please complete and return

4<sup>th</sup> Annual Private Wealth & Taxation Institute ♦ May 24-25, 2017

<b>CONTACT INFORMATION</b>	<b>SESSIONS</b>
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Please register for the session you would like to attend.

NAME \_\_\_\_\_

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MAILING ADDRESS \_\_\_\_\_

\_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE \_\_\_\_\_

REGISTRANT EMAIL \_\_\_\_\_

- Day 1- May 24
- Day 2 –May 25
- Both Days
- Webinar Day 1-May 24
- Webinar Day 2-May 25

**Dietary Restrictions:**

- Kosher     Gluten Free     Other \_\_\_\_\_

<b>REGISTRATION AND MATERIALS</b>	<b>CONTINUING EDUCATION CREDIT</b>
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**Fee includes: one set of materials, breakfast and lunch.**

- \$60.00 (\$75.00 at Door) Day 1 Registration
- \$60.00 (\$75.00 at Door) Day 2 Registration
- \$120.00 (\$150.00 at Door) Both Days Registration
- NCCPAP Member\*

**Please indicate which credit you wish to receive**

- CLE
- CPE
- Both CLE & CPE

**Materials – Advanced materials selection is required, on-site availability will be limited**

- Printed Materials     CD-ROM
- USB Flash Drive     Download Materials

\*NCCPAP Members discounted rate \$50.00 per day, \$75.00 for Both Days.

# 2017 PRIVATE WEALTH & TAXATION

## ONLINE REGISTRATION



Email: [events@meltzerlippe.com](mailto:events@meltzerlippe.com)

## REGISTER BY MAIL



Mail registration form and payment to:

Private Wealth & Taxation Institute  
190 Willis Avenue  
Mineola, NY 11501

## CREDIT CARD PAYMENT

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**For more information please call  
516-747-0300 ext. 125**

**Please register by May 15<sup>th</sup>.  
Seating is limited.**

For administrative use only

Authorization Code: \_\_\_\_\_ \$ \_\_\_\_\_

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Check Number: \_\_\_\_\_ \$ \_\_\_\_\_

## **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.

## **DIRECTIONS TO HOFSTRA:**

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 Tod Gitleson Hall on your left (across from Au Bon Pain).**