

Succession Planning: Retirement 101

Thursday, October 31, 2019 | 9:00 a.m. – 4:00 p.m.
DoubleTree Hilton Tarrytown | Westchester & Webcast

8:30 a.m.

Registration

9:00 a.m. – 9:10 a.m.

Welcome and Introduction

Anthony J. Enea, Esq. | Enea, Scanlan & Sirignano LLP
White Plains, NY

9:10 a.m. - 10:00 a.m.

Financial Planning Issues Impacting Your Retirement from the Practice of Law

- Determining if you have enough to Retire;
- Budgeting and Income Tax Issues;
- Understanding IRA's, 401k's and other qualified retirement assets
- Impact of Qualified monies on Medicaid eligibility

David Birnbaum | Senior Vice President - Investment Officer
PIM-Portfolio Manager | Wells Fargo Advisors | White Plains, NY
Anthony J. Enea, Esq. | Enea, Scanlan & Sirignano LLP
White Plains, NY

(1.0 Areas of Professional Practice)

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC.

10:00 a.m. - 10:50 a.m.

Long Term Care Insurance and Planning for Long Term Care

- Should Long Term Care Insurance and/or a Hybrid Policy be an option
- Pros and Cons of Long-Term Care and/or Hybrid policies;
- What are the other Long-Term Care Planning alternatives other than Insurance;
- The Pros and Cons of a Medicaid Asset Protection Trust

Charles J. Newman | The Charles J. Newman Co., LLC
Peekskill, NY
Anthony J. Enea, Esq. | Enea, Scanlan & Sirignano LLP
White Plains, NY

(1.0 Areas of Professional Practice)

10:50 a.m. – 11:05 p.m.

Break

11:05 p.m. – 12:00 p.m.

Federal and New York Estate and Gift Tax Issues

- Federal Estate and Gift Tax Exemption;
- Portability and Sunset Issues;
- New York Estate Tax Exemption;
- Planning Options to minimize Federal and New York Estate Taxes

Daniel S. Rubin, Esq. | Moses & Singer LLP | NYC

(1.0 Areas of Professional Practice)

Succession Planning: Retirement 101

Thursday, October 31, 2019 | 9:00 a.m. – 4:00 p.m.
DoubleTree Hilton Tarrytown | Westchester & Webcast

12:00 p.m. – 1:10 p.m.

Lunch Break

1:10 p.m. – 2:00 p.m.

The Sale of a Law Practice and its Tax Issues

- How is a Law Practice Valued;
- The tax issues impacting the sale

Howard Klein, CPA | Citrin Cooperman, LLP | White Plains, NY
Mandeep Trivedi, CFA | Citrin Cooperman, LLP
White Plains, NY

David A. Newberg, Esq. | Collier, Halpern, Newberg, Nollelli & Bock, LLP | White Plains, NY

(1.0 Law Practice Management)

2:00 p.m. – 3:00 p.m.

The Mechanics of a Sale of a Law Practice Ethical Considerations

- Basics of a contract sale;
- Ethical Issues of a sale

Matthew Lee-Renert, Esq. | NYS Grievance Committee for
9th J.D. | White Plains, NY

David A. Newberg, Esq. | Collier, Halpern, Newberg, Nollelli & Bock, LLP | White Plains, NY

(1.0 Ethics)

3:00 pm. – 3:10 p.m.

Break

3:10 p.m. – 4:00 p.m.

What Other Issues Will Impact My Retirement and Finances

- Medicaid Eligibility;
- The importance of Trusts and Last Wills;
- The importance of Advanced Directives such as Durable General Power of Attorney, Health Care Proxys, etc.

Sara Meyers, Esq. | Enea, Scanlan & Sirignano, LLP
White Plains, NY

Lauren C. Enea, Esq. | Enea, Scanlan & Sirignano, LLP
White Plains, NY

(1.0 Areas of Professional Practice)

4:00 p.m.

Adjournment