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HOST: Estate Planning Council of Bergen County, Inc.

DATE: May 9th, 2019

COST TO ATTEND: Regular members are free

 Guest & Senior Members $75 + processing

LOCATION: Stony Hill Inn, Hackensack, NJ

TIME: 4:30 pm – 8:00 pm

 (includes dinner during presentation)

TOPICS: 1. Life Settlements – The Fourth Option

 2. Spousal Lifetime Access Trusts Using Life Insurance

SPEAKERS: Pamela W. Bancsi, JD, CFP and

 Charles E. Perrault, CFP, CLU

RSVP: <https://bergenepcmay2019.eventbrite.com>

Continuing Education (Life Settlements – The Fourth Option):

Applications are pending for CTFA and NJ Insurance

NJ CPE: 1.0 credit Life Settlements – The Fourth Option (Intermediate Level/Topic Financial Planning)

CFP: 1.0 credit The CFP Board has granted 1.0 credit for Life Settlements – The Fourth Option. Program ID: 260389

CTFA: (pending) Life Settlements – The Fourth Option has been submitted to ABA Professional Certifications for CE credit review and is pending approval. Once we receive notification of the credit approval, we will notify attendees/participants.

NJ CLE:  1.0 credits. Life Settlements – The Fourth Option. This program has been approved by the Board on Continuing Legal Education of the Supreme Court of New Jersey for 1.0 hours of total NJ CLE (0.0 Ethics). Course #54

ESTATE PLANNING COUNCIL OF BERGEN COUNTY, INC.

215 GODWIN AVENUE, #23

MIDLAND PARK, NJ 07432

www.bergenepc.org

**OFFICERS**

**President:**

**JONATHAN F. JUSTICE, CTFA**

**SunTrust Bank**

**620 Fifth Avenue, Suite 200**

**New York, NY 10020**

Tel: 212-801-6351

E-mail: jonathan.justice@suntrust.com

**Vice-President:**

**DAVID KONIKOW, CLU®, ChFC®, AEP®, RHU®, REBC®, RICP®**

**NJL & C**

34 Eisenhower Parkway, Suite 2900

Livingston, NJ 07039

Tel: 973-535-0955

Fax: 973-535-1088

E-mail: dkonikow@njlc.com

**Secretary:**

**Matthew Jack, CFP®, CRPS**

**UBS Financial Services, Inc.**

61 South Paramus Road

Paramus, NJ 07652

Tel: 201-447-4907

Fax: 855-585-6148

E-mail: matthew.jack@ubs.com

**Treasurer & Chair, Estate Planners Day 2018**

**Kenneth Horowitz, CLU®, ChFC®, RICP®**

**Integrated Benefit Consultants**

800 Westchester Avenue, Suite N409

Rye Brook, NY 10573

Tel: 914-288-8946

Fax: 914-288-8803

E-mail: khorowitz@glic.com

**Chair, Estate Planners Day 2019**

**Laura A. Kelly, Esq.**

**McCarter & English LLP**

Four Gateway Center

100 Mulberry Street

Newark, NJ 07102

Tel: 973-639-6995

Fax: 973-297-3888

E-mail: lkelly@mccarter.com

**Chair, Membership:**

**JoAnne Geylin, CPA**

**EisnerAmper LLP**

750 Third Avenue

New York, NY 10017

Tel: 212-891-6042

Fax: 646-885-4261

E-mail: joanne.geylin@eisneramper.com

**Immediate Past President:**

**MICHAEL A. GOULD, CPA/ABV/CFF, ASA, CFE, CVA**

**ROTENBERG MERIL**

Park 80 West, Plaza One

250 Pehle Avenue, Suite 101

Saddle Brook, NJ 07663

Tel: 201-490-2077

Fax: 201-490-2071

E-mail: mgould@rmsbg.com

**Administrator:**

**VALERIE DARCHE**

**ESTATE PLANNING COUNCIL OF BERGEN COUNTY, INC.**

215 Godwin Avenue, #23

Midland Park, NJ 07432

E-mail: bergencouncil@gmail.com

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Continuing Education (Spousal Lifetime Access Trusts Using Life Insurance):

Applications are pending for CTFA and NJ Insurance

NJ CPE: 1.0 credit. Spousal Lifetime Access Trusts Using Life Insurance (Intermediate Level/Topic Tax, Consulting Services)

CFP: 1.0 credit pending

CTFA: (pending) Spousal Lifetime Access Trusts Using Life Insurance has been submitted to ABA Professional Certifications for CE credit review and is pending approval. Once we receive notification of the credit approval, we will notify attendees/participants.

NJ CLE:  1.0 credits. Spousal Lifetime Access Trusts Using Life Insurance. This program is pending by the Board on Continuing Legal Education of the Supreme Court of New Jersey for 1.0 hours of total NJ CLE (0.0 Ethics). Course #55

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**President:**

**JONATHAN F. JUSTICE, CTFA**

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