



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:
GRETCHEN S. BOARDMAN
ESTATE PLANNING COUNCIL OF BERGEN COUNTY, INC.
215 Godwin Avenue, #23
Midland Park, NJ 07432
Tel: 201-294-3337

CPE Program Notification Form for CPAs seeking credit

Program Title: Estate and Gift Valuation Issues

Presentation Date: Thursday, March 7, 2019

Location: Stony Hill Inn, Hackensack, NJ

Starting Time: 5:00 p.m. Ending Time 6:00 p.m.

Instructor: Leonard M. Friedman, CPA/ABV, CBA

Format: Lecture

Program Level: Intermediate

Description of Program: Estate & Gift Valuations Issues

Learning Objective: The objective of this course is to provide attendees with an overview of the IRS approach in challenging valuation discounts. The course will cover valuation issues of flow through entities and valuation issues with multiple levels of stock classes.

Requisite Knowledge and Experience: Basic Tax

Topic: Tax, Valuation

Advanced Preparation: None

Total CPE hours to be earned: 1.0 credit