



ESTATE PLANNING COUNCIL OF BERGEN COUNTY, INC.  
215 GODWIN AVENUE, #23  
MIDLAND PARK, NJ 07432  
[www.bergenepc.org](http://www.bergenepc.org)

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#### CPE Program Notification Form for CPAs seeking credit

**Program Title: Estate Planners Day 2019 – Planning for Larger Estates, Additional Trust Planning; Practice Safer**

**Presentation Date: Thursday, October 24, 2019**

**Location: Saddle Brook Marriott, Saddle Brook, NJ**

**Instructor: Martin M. Shenkman, Esq.**

**Format: Lecture**

**Program Level: Intermediate**

**Description of Program: Estate Planners Day 2019**

**Learning Objective: Complex trust planning and planning techniques for larger estates.**

**Requisite Knowledge and Experience: Basic**

**Topic: Estate Planning**

**Advanced Preparation: None**

**Total CPE hours to be earned: 1.5 credits**



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**Program Title: Estate Planners Day 2019 – Planning Before the 2020 Election; State Income Taxation of Trusts; Aging and Longevity**

**Presentation Date: Thursday, October 24, 2019**

**Location: Saddle Brook Marriott, Saddle Brook, NJ**

**Instructor: Martin M. Shenkman, Esq.**

**Format: Lecture**

**Program Level: Intermediate**

**Description of Program: Estate Planners Day 2019**

**Learning Objective:** With a possible shift of control in Washington on the horizon, various demographic trends, and increasing elder financial abuse, estate planning has become ever more complex. This presentation will explore various planning strategies that practitioners may employ to help clients capitalize on the estate tax environment created by the 2017 tax act, with consideration of these newer developments and trends.

**Requisite Knowledge and Experience: Basic**

**Topic: Estate Planning**

**Advanced Preparation: None**

**Total CPE hours to be earned: 1.0 credit**



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## CPE Program Notification Form for CPAs seeking credit

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**Program Title: Estate Planners Day 2019 – Ethics Red Flags**

**Presentation Date: Thursday, October 24, 2019**

**Location: Saddle Brook Marriott, Saddle Brook, NJ**

**Instructor: Gerard G. Brew, Esq., McCarter & English, LLP**

**Format: Lecture**

**Program Level: Intermediate**

**Description of Program: Estate Planners Day 2019**

**Learning Objective: To address ethics issues and concerns in matters relating to estate planning and administration.**

**Requisite Knowledge and Experience: Basic**

**Topic: Ethics**

**Advanced Preparation: None**

**Total CPE hours to be earned: 1.0 credit**