



ESTATE PLANNING COUNCIL OF BERGEN COUNTY, INC.
215 GODWIN AVENUE, #23
MIDLAND PARK, NJ 07432
www.bergenepc.org

HOST: Estate Planning Council of Bergen County, Inc.

DATE: September 20, 2018

COST TO ATTEND: Regular members are free
Guest & Senior Members \$75 + processing

LOCATION: Stony Hill Inn, Hackensack, NJ

TIME: 4:45 pm – 8:30 pm
(includes dinner following presentation)

TOPIC: 2018 Mid-Year Outlook – A New Narrative Emerges

SPEAKER: Talley Léger, OppenheimerFunds, Inc.

RSVP: <http://bergenepcseptember2018.eventbrite.com/>

Continuing Education:

CTFA - 1.25 credits "ABA Professional Certifications is dedicated to promoting the highest standards of performance and ethics within the financial services industry. 2018 Mid-Year Outlook - A New Narrative Emerges has been approved for 1.25 CTFA credits. This statement is not an endorsement of this program or its sponsor." Certification holders must report these credits at aba.csod.com.

CFP - 1.0 credit The CFP Board has granted credit for Program Name: 2018 Mid-Year Outlook - A New Narrative Emerges. Program ID: 253182

NJ CPE - 1.0 credit 2018 Mid-Year Outlook - A New Narrative Emerges (Topic: Other / Level: Intermediate). See attached document for Program Notification.

NJ Insurance - An application has been submitted for approval 1.0 credit

NJ CLE - 2018 Midyear Outlook - A New Narrative Emerges. 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).

OFFICERS

President:

JONATHAN F. JUSTICE
US TRUST
500 Campus Drive, Third Floor
Florham Park, NJ 07932
Tel: 973-245-4363
Fax: 800-976-5156
E-mail: jonathan.justice@ustrust.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/CFP, ASA, CFE, CVA
ROTENBERG MERIL SOLOMON BERTIGER & GUTTLA, PC
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
E-mail: bergenepc@gmail.com