

Agenda

Understanding the Grantor’s Goals and Potential Risks *J. Peraza*

- Long-term and short-term financial goals
- Identifying beneficiaries
- Identifying assets and potential risks
- Objectives for asset management and control
- Creation, duration, and termination of trust

Creating Revocable “Living” Trusts *J. Asher*

- Purposes of the revocable trust
- Benefits and drawbacks
- Funding the trust
- Administrative issues

Creating Irrevocable “Living” Trusts *J. Asher*

- Purposes of the irrevocable trust
- Benefits and drawbacks
- Funding the trust
- Administrative issues

Creating Testamentary Trusts *J. Calareso*

- Purposes of the testamentary trust
- Benefits and drawbacks
- Funding the trust
- Administrative issues

Asset Protection Planning for Seniors and the Disabled *J. Calareso*

- Overview of government benefit programs
- Trust options
- Planning for spouses, supplemental needs trusts

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All About Trusts in New York

Live, Interactive Webinar - Wednesday, July 17, 2024

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Learning Objectives

You’ll be able to:

Consider a grantor’s financial goals and potential risks when crafting trusts.

Explore the purposes, benefits and drawbacks of revocable and irrevocable living trusts.

Examine the purposes and drawbacks of testamentary trusts.

Discuss issues surrounding trust funding and administration.

Explore trust options and other options for asset protection planning.



HalfMoon Education Inc.,
Your LIVE Education Leader Presents

All About Trusts in New York

Live, Interactive Webinar - Wednesday, July 17, 2024



Understand the grantor’s short-term and long-term financial goals and potential risks

Discuss the purposes, benefits and drawbacks of revocable and irrevocable living trusts

Get tips on creating testamentary trusts

Consider asset protection planning options for seniors and the disabled

Continuing Education Credits

Accountants
7.2 CPE Credits

Attorneys
7.0 CLE Hours



Webinar Information

Online - Wednesday, July 17, 2024 | 8:30 am - 3:30 pm EDT

Log into Webinar: 8:00 - 8:30 am EDT

First Session: 8:30 - 11:00 am EDT

Break: 11:00 - 11:30 am EDT

Second Session: 11:30 am - 1:00 pm EDT

Break: 1:00 - 1:30 pm EDT

Third Session: 1:30 - 3:30 pm EDT

Tuition

\$339 for individual registration.

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Faculty

Jessica M. Peraza *Lippes Mathias LLP in Buffalo*

Ms. Peraza focuses her practice on estate planning and administration, Medicaid, and long-term care planning. As a law student, she interned for the Hon. Barbara Howe in Erie County Surrogate's Court and worked in the Public Benefits Unit of Neighborhood Legal Services. Her previous experience includes residential foreclosures, public and private sector labor law, contract negotiations, probate matters, third party credit collections, and representation of clients in administrative hearings and arbitrations.

Jeffrey A. Asher *Law Offices of Jeffrey A. Asher, P.C., in Armonk*

Mr. Asher is admitted to practice in New York and Connecticut. He is a member of the New York State Bar Association, where he serves on the executive committee of the Elder Law and Special Needs Section and on the Executive Committee of the Trusts & Estates Law Section. Mr. Asher is quite active with the legislative and lobbying efforts of both Sections. He concentrates primarily in the areas of sophisticated estate planning for high net-worth individuals and family businesses, asset protection planning to safeguard assets against creditors, estate and trust litigation, estate and trust administration, special needs planning, and elder law/Medicaid planning.

JulieAnn Calareso *Of Counsel, Gleason Dunn Walsh & O'Shea, P.C., in Albany*

Ms. Calareso joined Gleason, Dunn, Walsh & O'Shea in May of 2022, bringing her experience in elder law, guardianships, trusts and estate planning and administration, and special needs planning to the firm. Ms. Calareso has practiced in these areas of law after graduating from Albany Law School in 2003. Ms. Calareso came to law as her second career, having graduated from Fordham University with an undergraduate degree in Communications. After years in television and movie production in Manhattan and Los Angeles, she moved into a field where she could make an impact on peoples' lives on a daily basis. Her dedication to her practice of law comes from her personal experiences within her family and her fervent belief in the need for planning and for family collaboration across the generations.

Additional Learning

New York Elder Law and Planning Update

Online | Thursday, June 20, 2024 | 8:30 am - 3:30 pm EDT

Credits:

Accountants 7.2 CPE Credits

Attorneys: 7.0 CLE Hours Incl. 1.0 Ethics Hour

Agenda Topics:

Medicare: Addressing Clients' Basic Questions

Current Options for Paying for Long-Term Care

The Nuts and Bolts of Guardianships in New York

New York Independent Assessor (NYIA) Program

Handling Ethical Issues in Representation of the Elderly

Financial Planning for the Elderly and Disabled

Credit Information

This webinar is open to the public and is designed to qualify for up to 7.2 CPE credits for accountants and 7.0 CLE hours for attorneys in New York. Professionals seeking continuing education credits in other states may be able to claim the hours earned at this webinar; please refer to specific board rules to determine eligibility.

This webinar offers accountants 7.2 CPE credit hours (based on 50-minute hours) of intermediate-level group internet-based CPE credits in the area of Specialized Knowledge. Knowledge of trusts is beneficial, and no advance preparation is recommended. NASBA Sponsor No. 103015.

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HalfMoon Education is certified by the New York State CLE Board as an Accredited Provider of CLE programs. This nontraditional format course offers 7.0 Areas of Professional Practice CLE hours which are appropriate for experienced attorneys. HalfMoon Education will provide financial hardship assistance to New York attorneys who wish to attend this event. Contact Frank Chapman at fchapman@halfmoonseminars.org for details and to apply.

Attendance will be monitored, and attendance certificates will be available after the webinar for those who attend the entire course, respond to prompts and score a minimum 80% on the quiz that follows the course (multiple attempts allowed).

On-Demand Credits

The preceding credit information only applies to the live presentation. This course in an on-demand format is not eligible for any of the listed credits.

Presented by

Sarah Murdoch *Director of Client Services at Medicare Rights Center*

Moir Laidlaw *Hollis Laidlaw & Simon P.C.*

Michael Korsinsky *Korsinsky & Klein*

Lauren Enea, Esq. *Enea, Scanlan & Sirignano*

Robert Arbuco, Esq. *Enea, Scanlan & Sirignano*

Deborah S. Ball *Law Offices of Deborah S. Ball*

Alfred Polizzotto, III, Esq., CFP *Polizzotto & Polizzotto, LLC*