



NYSBA

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Trusts and Estates Law Section Fall Meeting

September 14 -15, 2017

**Hyatt Regency Buffalo Hotel and
Conference Center
Buffalo, NY**



The New York State Bar Association's Meetings Department has been certified by the NYS Continuing Legal Education Board as an accredited provider of continuing legal education in the State of New York. Under New York's MCLE rule, this two-day program will provide up to 6.5 credit hours consisting of 5.5 credits in Professional Practiced and 1.0 in Ethics. This program is not transitional and is not suitable for MCLE credit for newly-admitted attorneys. (attorneys admitted 2 years or less).

SCHEDULE OF EVENTS

Thursday, September 14

Estate Planning for the Closely-Held Business

- 10:30 a.m. – 5:00 p.m. **Registration and Exhibitors - Regency C Foyer**
- Noon – 2:00 p.m. **Executive Committee Luncheon Meeting - Grand Ballroom EFG**
- 2:00 – 5:00 p.m. **General Session - Regency Ballroom**
- 2:00 – 2:10 p.m. **Introductory Remarks** **NYSBA Welcome**
Sharon L. Wick, Esq. **Michael Miller, Esq.**
Section Chair President-Elect
- 2:10 – 3:00 p.m. **Estate Planning for the Closely-Held Business** *(1.0 credits in Areas of Professional Practice)*
Speakers: **Joseph T. La Ferlita, Esq.**, Farrell Fritz P.C., Uniondale
Thomas J. Collura, Esq., Hodgson Russ LLP, Albany
- 3:00 – 3:50 p.m. **Drafting Effective Shareholder and Operating Agreements for the Closely-Held Business and Pitfalls that May Arise for Estates in the Absence of Such Agreements**
(1.0 credits in Areas of Professional Practice)
Speaker: **Benjamin M. Farber, Esq.**, Phillips Lytle LLP, Albany
- 3:50 – 4:05 p.m. **Refreshment Break with Exhibitors - Regency C Foyer**
Sponsored by NYSARC Trust Services
- 4:05 – 4:55 p.m. **Digital Assets** *(1.0 credits in Areas of Professional Practice)*
Speakers: **Honorable Barbara Howe**, Erie County Surrogate's Court Judge
Jill Choate Beier, Esq., Beier & Associates, PLLC, Lake Placid
- 5:30 p.m. **Buses Depart for Darwin D. Martin House Complex**
Sponsored by MPI Business Valuation & Advisory
- 6:00 – 7:30 p.m. **Cocktail Reception - Great Pavilion at the Darwin D. Martin House Complex**
There will be a tour of the Darwin D. Martin House upon our arrival. This tour will be approximately 45 minutes long. Cocktails and hors d'oeuvres will be served after the tour at the Great Pavilion with buffet dinner following.
Cocktail beverages sponsored by Jack Hunt Gold & Silver
Hors d'oeuvres sponsored by Phillips Lytle LLP
- 7:30 – 9:00 p.m. **Buffet Dinner – Great Pavilion**
Wine with dinner sponsored by Farrell Fritz, P.C.
- 9:00 – 9:30 p.m. **Buses Begin to Depart for Hyatt Hotel**

SCHEDULE OF EVENTS

Friday, September 15

Contested Accounting Proceedings

- 8:00 a.m. – 12:30 p.m. **Registration and Exhibitors - Regency C Foyer**
- 8:00 – 9:00 a.m. **Committee Breakfast Meetings - Grand Ballroom EF**
- 9:15 a.m. – 12:30 p.m. **GENERAL SESSION - Regency Ballroom**
- 9:15 – 9:20 a.m. **Introductory Remarks and Fact Pattern**
Holly A. Beecher, Esq. **Robert M. Harper, Esq.**
Program Co-Chair Program Co-Chair
- 9:20 – 9:45 a.m. **Inheritance Rights of Posthumously-Conceived Children and Posthumous Issues**
(.5 Credits in Areas of Professional Practice)
- Speaker:* **Kenneth A. Grossberg, Esq.**, Phillips Lytle LLP, Buffalo
- 9:45 – 10:35 a.m. **The Accounting, Pre-Objection Discovery, and Objections** *(1.0 Credits in Areas of Professional Practice)*
- Speakers:* **Jennifer G. Flannery, Esq.**, Barclay Damon LLP, Buffalo
Jennifer F. Hillman, Esq., Ruskin Moscou Faltischek, P.C., Uniondale
- 10:35 – 10:50 a.m. **Refreshment Break with Exhibitors - Regency C Foyer**
Sponsored by Empire Valuation Consultants
- 10:50 – 11:40 a.m. **The Accounting Trial and Evidentiary Issues** *(1.0 Credits in Areas of Professional Practice)*
- Speakers:* **Gary B. Freidman, Esq.**, Greenfield Stein & Senior, LLP, New York City
Eric W. Penzer, Esq., Farrell Fritz, P.C., Uniondale
- 11:40 a.m.– 12:30 p.m. **Ethics of Getting Paid: Attorneys' Fee Awards and Surcharges in Accounting Proceedings**
(1.0 Credits in Ethics)
- Speakers:* **Honorable Louis P. Gigliotti**, Oneida County Surrogate's Court Judge
Honorable John M. Owens, Monroe County Surrogate's Court Judge
Honorable Brandon R. Sall, Westchester County Surrogate's Court Judge

CLE Information

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Discounts and Scholarships:

New York State Bar Association members and non-members may receive financial aid to attend this program. Under this policy, anyone who requires financial aid may apply in writing, **not later than ten working days** prior to the start of program, explaining the basis of his/her hardship, and if approved, can receive a discount or scholarship, depending on the circumstances. For more details, please contact: Lori Nicoll, New York State Bar Association, One Elk Street, Albany, New York 12207. 518.487.5563 or Inicoll@nysba.org.

Special Discounts:

Attorneys admitted for less than 10 years are entitled to receive a \$50.00 discount by joining the Young Lawyers or Trusts and Estates Law Sections. Already a YLS member? The \$50.00 discount will be applied to your registration fee.

Accommodations for Persons with Disabilities:

NYSBA welcomes participation by individuals with disabilities. NYSBA is committed to complying with all applicable laws that prohibit discrimination against individuals on the basis of disability in the full and equal enjoyment of its goods, services, programs, activities, facilities, privileges, advantages, or accommodations. To request auxiliary aids or services or if you have any questions regarding accessibility, please contact Lori Nicoll at 518.487.5563 or Inicoll@nysba.org.

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