ESTATE PLANNERS DAY 2025

WEALTH, WISDOM AND WELL-BEING

WELCOME TO ESTATE PLANNERS DAY 2025

WEALTH, WISDOM, AND WELL-BEING

We're thrilled to gather today for the Estate Planning Council of New York City's premier event of the year. Just as we do annually, we've curated an array of speakers and presentations to deliver engaging and insightful discussions on the latest in estate planning.

Our mission with the Council is to unite professionals across various estate planning disciplines. This event serves as a platform for earning continuing education credits, forging connections with industry leaders, and exploring emerging trends in the estate planning arena. While today is indeed special as Estate Planners Day, it reflects the ongoing commitment of EPCNYC. Throughout our programming year, our regular evening events offer the same enriching experiences to our members. If you're not already part of EPCNYC, please explore the membership details included in this program.

Whether you're a seasoned member or new to EPCNYC, we encourage you to make the most of today's offerings. And don't forget to join us later this afternoon for some networking and camaraderie over drinks with colleagues.

Welcome, from the EPCNYC Board of Directors and the Estate Planners Day Committee!

Frazer Rice

FRAZER RICE
President, Estate Planning Council of NYC

TARA MAHON
Chair, Estate Planners Day

TODAY'S AGENDA AT-A-GLANCE

TIME	SESSION	LOCATION
8:00 AM	Registration & Breakfast with Exhibitors	Library
8:45 AM	Morning Welcome – Sponsored by Luminary	Lincoln Hall
9:00 AM	**Bridging Beliefs and Behaviors: Key Insights into Effective Wealth Transfer Across Generations** ***David Herritt,*** *Head of Truist Wealth Center for Family Legacy*	**Lincoln Hall**
9:50 AM	Refreshment Break with Exhibitors	Library
10:20 AM	**The Beneficiary Well-being Trust and Other Recent Developments from Delaware** ***Raymond Radigan,*** *Senior Managing Director, Peapack Private Bank & Trust Wealth Management*	**Lincoln Hall**
11:10 AM	Refreshment Break with Exhibitors	Library
11:40 AM	**Defensive Estate Planning – An Ounce of Prevention** ***Brian Corrigan,*** *Partner, Farrell Fritz, P.C.*	**Lincoln Hall**
12:30 PM	Lunch Buffet	Dining Room
1:40 PM	**Getting a Step Up for Basis** ***Jonathan Blattmachr,*** *Director of Estate Planning Peak Trust Company*	**Dining Room**
2:30 PM	Dessert & Networking with Exhibitors	Library
3:05 PM	**Cryptocurrencies and Charitable Gifting – The Spring 2025 Update** ***John Varga,*** *Partner, Management Planning Inc*	**Lincoln Hall**
3:55 PM	Refreshment Break with Exhibitors	Library
4:25 PM	**From Structure to Savings: Leveraging Family Offices for Tax Advantage** ***Rozleen Giwani,*** *Tax Partner, Grassi*	**Lincoln Hall**
5:15 PM	Closing Remarks	Lincoln Hall
5:30 PM	Cocktail Reception – ***Sponsored by KLG***	Library

FEATURED SPEAKERS

9:00 AM - BRIDGING BELIEFS AND BEHAVIORS: KEY INSIGHTS INTO EFFECTIVE WEALTH TRANSFER ACROSS GENERATIONS

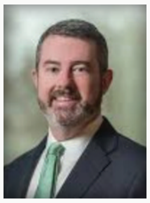
DAVID HERRITT, Head of Truist Wealth Center for Family Legacy

David Herritt leads the Center for Family Legacy at Truist Wealth, focusing on family governance, education, and engagement. With over 30 years in trust and estate services, including roles at Bankers Trust and U.S. Trust, he now helps families navigate communication, planning, and wealth transfer across generations. David is a frequent speaker and writer on family dynamics and next-gen education.

10:20 AM - THE BENEFICIARY WELL-BEING TRUST AND OTHER RECENT DEVELOPMENTS FROM DELAWARE

RAYMOND RADIGAN, Senior Managing Director at Peapack Private Bank & Trust Wealth Management

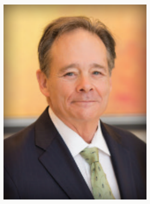
Raymond Radigan has over 35 years of experience in trust and estate planning and currently leads Peapack Private's Wealth Management in New York. He previously held leadership roles at First Republic and TD Bank and began his career as a trust and estates attorney. A frequent speaker and published author, Raymond serves on several professional and nonprofit boards.



11:40 AM - DEFENSIVE ESTATE PLANNING – AN OUNCE PREVENTION

BRIAN CORRIGAN, Partner at Farrell Fritz, P.C.

Brian Corrigan is a trusts and estates litigator at Farrell Fritz, with deep experience in Surrogate's Court proceedings. A Fellow of ACTEC, he has led multiple bar committees and frequently lectures on fiduciary litigation. Brian is also active in professional advisory groups and community organizations, including the New York Community Trust.



1:40 PM - GETTING A STEP UP FOR BASIS

JONATHAN BLATTMACHR, Director of Estate Planning for Peak Trust Company

Jonathan Blattmachr is a renowned estate planning attorney and Director at Peak Trust Company. A Columbia Law graduate and author of over 500 articles, he has held senior roles at Milbank and is co-creator of Wealth Transfer Planning™. Jonathan is a frequent speaker, military veteran, pilot, and community guide in Southampton, NY.

3:05 PM - CRYPTOCURRENCIES AND CHARITABLE GIFTING - THE SPRING 2025 UPDATE

JOHN VARGA, Partner at MPI

John Varga is a Partner at MPI in New York, specializing in valuation of closely held businesses for estate, gift, and tax planning. With deep experience across industries, including real estate and tech, he is active in the Estate Planning Council of NYC and serves on the Board of the American Society of Appraisers' Princeton Chapter.

4:25 PM - FROM STRUCTURE TO SAVINGS: LEVERAGING FAMILY OFFICES FOR TAX ADVANTAGE

ROZLEEN GIWANI, Tax Partner at Grassi

Rozleen Giwani, CPA, is a Tax Partner at Grassi, where she advises high-net-worth individuals and family offices on tax strategies. With 18+ years of experience and expertise in real estate tax planning, she is active in the AICPA and NYSSCPA and was recognized as an Emerging Leader Under 40 in 2021.

PROTECTING YOUR LEGACY

At Farrell Fritz, our attorneys provide clients throughout New York with seamless access to comprehensive legal expertise backed by decades of experience.

Unparalleled Expertise in Trusts & Estates

Our Trusts & Estates practice group stands apart with more ACTEC Fellows than any other firm in New York State, a distinction that reflects our attorneys' exceptional knowledge, experience, and high standards of professional conduct.

We help individuals, families, and owners of closely held and family businesses preserve, protect, and transfer their assets with strategic foresight. From complex planning to personal counsel, Farrell Fritz's distinguished team guides you through the complexities of preserving your legacy and planning for tomorrow.

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MEMBERSHIP IN EPCNYC

If you are not yet a member of EPCNYC, here is what you are missing out on...

- Access to an elite crowd of engaged estate planning professionals.
- Admission to our 4 Evening Programs.
- Continuing education credits for most disciplines at each of our events.
- Admission to our Members Only events. Including informal brown bag programs, the annual Heckerling Review, and other networking events.
- Access to Members Only Resources. Including the Membership Directory and the Presentation Archive.
- Membership of the National Association of Estate Planners & Councils and all of their additional resources.

EPCNYC offers two types of membership, Individual & Firm. Individual membership allows a member to serve on the board and bring guests to our evening programs. Firm members can have a different employee attend each of the four evening programs. For firms with younger professionals who may not be able to join the Council on their own, this is a great benefit.

Making Your EPCNYC Membership Renewal Easier

EPCNYC UTILIZES AUTO RENEWAL

The EPCNYC membership year runs from June 1 – May 31. As a benefit, all members have been automatically enrolled in auto-renewal. An invoice has been populated to your profile for the upcoming membership year (June 1, 2025 – May 31, 2026). On May 31, if you used a credit card to pay your 2024-2025 dues, that card will be charged for the dues for this coming membership year. Prior to this automatic charge occurring, you can view/print your invoice, update your billing information, or cancel the auto-billing if you so choose. To do one of these actions, login to your EPCNYC profile and click on "Membership". **You will need to make your adjustments before May 31st.**

The major benefit of auto-renewal is the convenience it offers. As our members are busy in their professions as well as personal lives, we realize that sometimes renewing your EPCNYC membership can be put on the back burner. This process makes it easy as renewing will be automatically completed each year, allowing our members not to be disrupted in their daily lives.

> PRE-PAY MEMBER: $575
With this membership option, your attendance fee is covered for all 2025-2026 EPCNYC Evening Programs.

> PAY PER EVENT MEMBER: $400
With this membership option, you pay only for the 2025-2026 EPCNYC Evening Programs you attend (each event is $100).

> FIRM MEMBERSHIP: $750
With this membership option, it entitles that firm to send one individual to each Council event that year. The designated individual can vary from event to event.

GENERAL INFORMATION

CONTINUING EDUCATION CREDITS:

The full Estate Planners Day agenda and program has been submitted for the following continuing education credits:

- **Accounting – NY CPE**
- **Banking – American Bankers Association, Institute of Certified Bankers, CTFA**
- **Financial Planning – Certified Financial Planner Board of Standards, CFP**
- **Legal – NY CLE**

Please Note: Once approval has been received, certificates will be provided to the individuals who completed the sign in and out sheet and stayed for the full day's programming.

PRESENTATION MATERIALS:

The Estate Planners Day presentation materials, as well as previous EPCNYC presentation materials, are available to all members on the EPCNYC website. Members can find these materials under the Professional Resources: Members Only page. Members are required to log in to epcnyc.com to access this area of the website.

PARTNERING WITH EPCNYC:

If you are interested in sponsoring one of the Estate Planning Council of New York City's events, or partnering with EPCNYC in other ways, please contact the Council Office to discuss future opportunities at **epcnyc@caphill.com.**

JOIN OUR EMAIL LIST:

If you are not a member of EPCNYC but would like to receive emails about future events and current EPCNYC news, please email **epcnyc@caphill.com** to subscribe. You can also use the link on the EPCNYC homepage to subscribe.

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WE ARE PROUD TO SUPPORT

ESTATE PLANNERS DAY 2025

We applaud the Estate Planning Council of New York City's commitment to promoting education and thought leadership for industry professionals.

J.P.Morgan PRIVATE BANK

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