Long Island

ADVISING FAMILIES ACROSS GENERATIONS

Join us for STEP Long Island's complimentary breakfast

WHAT IS VUCA...AND WHY SHOULD ESTATE PLANNING PROFESSIONALS CARE?

Today's estate planning professionals are continually confronted with challenges operating in a VUCA world. Whether you're an attorney, accountant, or financial professional; as an advisor to high net worth clients – you've experienced client's inability to make a decision and proceed with their estate planning issues. So how has the **V**olatility of markets, **U**ncertainty of the future, and the **C**omplexity of changing laws left your clients in a vulnerable and **A**mbiguous state?

WELCOME TO A VUCA WORLD

VUCA is an acronym for volatility, uncertainty, complexity and ambiguity, it captures the most salient challenges faced by individuals and entities trying to discern direction and make decisions in these challenging times. This month, STEP will be hosting a unique panel discussion on doing business in light of VUCA. Mitchell S. Stein, TEP (Senior Advisor of Chernoff Diamond's Private Client Group) will moderate a diverse panel:

- **Jordan Linn** *(Counsel in the Trusts & Estates practice at Farrell Fritz, P.C.)* assists clients with structuring and implementing sophisticated gift, estate and generation-skipping tax planning techniques, representing fiduciaries in probate and administration of estates and trusts, and the forming private foundations and public charities.
- **Kevin Batterton** *(Managing Director of New York Private Trust Company)* advises high net worth individuals, foundations and family offices in areas of trust and estate planning, investment management and private banking.
- **Deborah Barcham** *(Partner in the Trusts & Estates practice at L'Abbate, Balkan, Colavita, Contini, LLP)* counsels clients in the development and implementation of complex estate plans including GRATs, QPRTs, family limited partnerships, private annuities, charitable foundations and generation skipping and life insurance trusts.
- **Michael Aronson** *(Partner of Chernoff Diamond & Co., LLC's Risk Management Group)* protects clients' assets and reduces their risk by working with them to review and analyze their current program to uncover gaps or duplications in coverage.

IN OUR SESSION WE WILL:

- Identify some of the VUCA challenges in effective estate planning
- Engage in a proactive dialogue on how to overcome VUCA Estate Planning issues
- Help you chart a course for success with your clients to re-focus the issues

VENUE & SPONSOR

FARRELL FRITZ, P.C.
1320 RXR Plaza
Uniondale, NY 11753

West Tower | 13th Floor

WHEN

Tuesday March 17, 2015
Breakfast/Registration: **8:30AM**
Program will begin at: **8:45AM**
Ends at: **10AM**

REGISTER

RSVP by March 12, 2015
via email to:
STEPlongisland@mlg.com
or by phone to:
516-747-0300 ext. 125