



ETHICS FORUM

“ETHICS OF TRUST MODIFICATION”

TUESDAY, APRIL 30, 2019

THE UNION LEAGUE
140 SOUTH BROAD STREET
PHILADELPHIA, PA 19102

8:00 – 8:30 A.M. REGISTRATION & BREAKFAST
8:30 – 10:30 A.M. PROGRAM

The ethics forum will address the ethical implications of a recent phenomenon- trust modification. To whom, if anyone, do we owe duties of loyalty or duties of care? Should we be concerned that the trust grantor may have thought the term “irrevocable” has a different meaning today than, perhaps, when the instrument was created? Should the issues be considered differently by lawyers advocating for a client, than other advisors on an estate planning team? In our analysis, we plan to discuss one of the most noteworthy trust modification decision, the Barnes case. Join us for an exciting panel discussion.

TWO Education Credits for CLE - Ethics (PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.

Panelists:

- Richard Bell, Planning Capital Management
- Paul C. Heintz, Esq., Obermayer Rebmann Maxwell & Hippel, LLP
- Terrance Kline, Law Office of Terrance A. Kline
- Melinda Rath, Glenmede Trust Company
- Bradley Terebelo, Heckscher Teillon Terrill & Sager, P.C.

This program is being co-sponsored by



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APRIL 30, 2019 ETHICS FORUM PROGRAM
REGISTRATION FORM

Luncheon Program Fee:

PEPC Members \$40 Non-Members \$60

Registration fee includes continental breakfast and education credits.

\$5 additional charge for walk-in registrations at the door without pre-registration.

No-shows will be billed. No refunds after April 26, 2019.

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

PEPC Member (\$40 per person) Non-Member (\$60 per person)

CONTINUING EDUCATION INFORMATION:

Continuing Legal Education (2 ETHICS credit).....Attorney ID: _____

Insurance Continuing Education (2 credit).....License Number: _____

CFP® Continuing Education (2 credit).....Last 4 Digits of SSN: _____

CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.

PAYMENT INFORMATION:

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at www.philaepc.org. **Members must be logged into the site to receive the discounted member pricing.**

Return by Mail: Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

Return by Fax: 856-727-9504

Register Online: www.philaepc.org

Questions: 215-486-6215 (*Registrations will not be accepted via phone*)