FEBRUARY LUNCHEON PROGRAM

"THE SECURE ACT: A WHOLE NEW GAME FOR RETIREMENT PLANNING"

TUESDAY, FEBRUARY 11, 2020

THE UNION LEAGUE
140 SOUTH BROAD STREET
PHILADELPHIA, PA 19102

11:45 – 12:00 P.M. REGISTRATION
12:00 – 12:30 P.M. LUNCHEON
12:30 – 1:45 P.M. PROGRAM

The recent passage of the SECURE Act at the end of December brought significant changes to the planning landscape with respect to retirement assets. A number of the most common planning considerations for these assets now will have to be re-thought or re-worked. New techniques may be needed to achieve benefit and some older planning techniques and structures now no longer achieve the desired results. This presentation will focus on the changes brought about the SECURE Act in connection with common client planning situations, will review the major provisions of the new legislation that affect individual holders and participants, will cover problem areas that may arise from planning done under the prior law, and will present some new techniques for consideration. As with any piece of new legislation, there are many open issues and areas of uncertainty but we'll discuss what is known as of now

One Education Credit for CLE (PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.

Speaker:
Brad J. Richter is a partner and chair of the trusts and estates department at Fried, Frank, Harris, Shriver & Jacobson LLP, resident in Fried Frank's New York office.

Mr. Richter's practice focuses on all aspects of private client representation, including sophisticated tax and estate planning, administration of large estates and trusts, succession and business planning, and formation and operation of charitable foundations. He represents high net worth individuals, entrepreneurs, the fiduciaries of estates and trusts, charitable organizations, family business owners, bankers and financial services personnel, private fund sponsors and principals, and others. He also represents clients engaging in litigation with the IRS or with third parties before the Surrogate's Court on contested tax and probate matters.

Mr. Richter received his JD, cum laude, from New York University School of Law, where he was a member of the NYU Law Review. He graduated magna cum laude from Amherst College. He is admitted to the bar in New York and Massachusetts.

Mr. Richter is a member of the American Bar Association (Real Property, Probate & Trusts Law Section; Taxation Section), New York State Bar Association (Trusts and Estates Law Section; Entertainment, Arts and Sports Law Section), New York County Lawyers Association (Estates, Trusts and Surrogate's Court Practice Section; previous: Committee on Pro Bono), and the Association of the Bar of the City of New York (Committee on Estate and Gift Taxation, previous: Committee on Surrogate's Courts).

This meeting is being sponsored by

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February 11, 2020 LUNCHEON PROGRAM
Registration Form

Luncheon Program Fee:

PEPC Members	$45	Non-Members	$65

Additional Fees:

CLE Credit (Members)	$15	CLE Credit (Non-Members)	$15
Insurance Credit (Members)	$15	Insurance Credit (Non-Members)	$15
CFP® Credit (Members)	$15	CFP® Credit (Non-Members)	$15

$5 additional charge for walk-in registrations at the door without pre-registration.
No-shows will be billed. No refunds after February 7, 2020.

ATTENDEE INFORMATION:

Name: ______________________ Discipline: ______________

Company: ______________________________

Address: ______________________________

City, State, Zip: ______________________________

Phone: ______________________ Email: ______________________

☐ PEPC Member ($45 per person) ☐ Non-Member ($65 per person)

Please select your lunch entrée:

☐ Grilled Filet Mignon, Twice Baked Chive Potato, Spinach, Horseradish
☐ Mediterranean Vegetable Lasagna, Roasted Tomato Marinara, Grana Padano
☐ Special Dietary Needs: ______________________________

CONTINUING EDUCATION INFORMATION:

(Fee: $15 per Credit)

☐ Continuing Legal Education (1 credit)....................Attorney ID: ______________
☐ Insurance Continuing Education (1 credit)............License Number: ______________
☐ CFP® Continuing Education (1 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)*