



JANUARY LUNCHEON PROGRAM

“A PEEK BEHIND THE CURTAIN: DRAFTING ISSUES FROM THE TRUSTEE’S PERSPECTIVE”

TUESDAY, JANUARY 18, 2022

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

COFFEE MEET AND GREET:

The Professional Women’s Network Committee has organized a meet and greet coffee station prior to our luncheon program. The event will be held in the Farragut Room (adjacent to Lincoln Hall on the Broad Street side of the main meeting room) from 11:30 a.m.-12:00 p.m. All meeting attendees are welcome to join us!

This presentation will focus on the sometimes surprising, sometimes counterproductive, and sometimes disastrous impacts of drafting choices on the administration of trusts. Issues range from guidance to the trustee, or lack thereof, to potential estate tax inclusion. The goal is to provide insights to help ensure that the structure of a trust is best designed to achieve the client’s tax and non-tax goals.

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

Speaker:

Mark R. Parthemer, Esq., AEP is a Managing Director for TIAA, responsible for working with ultra-high net worth clients and their advisors to develop practical and efficient wealth transfer and holistic financial plans. He joined TIAA, a Fortune 100 financial services firm, in 2021, after serving for 17 years as Senior Fiduciary Counsel at Bessemer Trust. Prior to that, he was in private law practice in Pennsylvania and Florida, finishing as a Trust and Estate partner with Duane Morris LLP. He also spent several years at PricewaterhouseCoopers and was involved in private businesses.

Mr. Parthemer is a nationally recognized speaker and frequently published author. He is an ACTEC Fellow, serving on the Program, Digital Assets and Estate and Trust committees, and is in leadership of the Real Property Trust and Estate Section of the American Bar Association, the Florida Bankers Association (Board Member; Past Chair Legislation Committee) and the Florida and Pennsylvania Bar Associations. He is an Associate Editor and Columnist for the Journal of Financial Service Professionals, member of Synergy Summit (Past President), the Palm Beach County Estate Planning Council (Board Member), and the Palm Beach Tax Institute. He was awarded the 2014 Article of the Year from the American Bar Association’s Probate & Property magazine and named the Florida Bankers Association 2015-2016 Banker of the Year.

He frequently is faculty for the University of Miami’s prestigious Heckerling Institute, was an Adjunct Professor, Widener University School of Law, and guest lectures at the Dickinson School of Law and the LLM programs at the University of Miami School of Law and the University of Florida Levin College of Law. He has been quoted in the Wall Street Journal, Barron’s, NY Times and MONEY Magazine, and has been honored by Best Lawyers in America with their Lifetime Achievement Award.

He earned a J.D. from The Dickinson School of Law, B.A. and B.S. degrees in philosophy and government from Franklin and Marshall College, conferred status of an Accredited Estate Planner, and completed MBA Phase I curriculum.

The Philadelphia Estate Planning Council does not render any legal, accounting or other professional services. The Council’s programs and publications are designed solely to help professionals maintain their professional competence. In dealing with specific matters, the individual using any publication obtained through the Council or any information orally conveyed by speakers at programs sponsored by the Council or in materials distributed by the Council should research original sources of authority independently.

JANUARY 18, 2022 LUNCHEON PROGRAM REGISTRATION FORM

Luncheon Program Fee:

PEPC Members	\$45	Non-Members	\$65
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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 January 14, 2022

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:

French Cut Chicken Breast, Sweet Potato Puree, Kale, Apple Chicken Jus

Farfalle Spinach, Blistered Grape Tomatoes, Locatelli

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*)