October HYBRID LUNCHEON PROGRAM

"Private Placement Life Insurance (PPLI) - What Every Estate Planner Should Know"

Tuesday, October 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 DEI 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!

BRING A GUEST FOR FREE TO THE OCTOBER MEETING:
To celebrate National Estate Planning Awareness Week and introduce more estate planning professionals to our council and allow them to experience one of our high-quality luncheon programs, current PEPC members are invited to bring a NON-MEMBER guest to the October luncheon program at NO CHARGE. We encourage all members to bring a colleague who would be a potential new member of the PEPC. Please take advantage of this opportunity to add to the pool of estate planning professionals that make up PEPC's membership. When registering for the meeting through the PEPC website, you will have the option to add a guest to your registration at no charge.

In recent years, the market for Private Placement Life Insurance (PPLI) Investment Accounts has grown rapidly. PPLI Investment Accounts offer the ability to invest in a tax-exempt environment, and the value proposition is a simple one: the cost of a PPLI Investment Account is lower than the cost of taxes that would otherwise be payable on realized investment gains. There are now over 400 registered funds (traditional asset class) and over 225 non-registered funds (alternative asset class) that can accept allocations from PPLI Investment Accounts. In addition, for a large account, the client can have a Registered Investment Advisor firm of their choice manage the PPLI Investment Account assets. This session will provide an overview of PPLI Investment Accounts, and will cover the tax and structural attributes, the economics, and the key applications for high-net-worth families.

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

Speaker:
Michael B. Liebeskind is a founder of four independent operating businesses, all of which have a deep infrastructure: Golconda Partners / Mandorlo International (founded in 2019), SALI Fund Services (founded in 2002), Covala Group (founded in 1993) and Winged Keel Group (founded in 1989). Michael graduated from Princeton University in 1981. He began his professional career with the accounting firm of Coopers & Lybrand, where he became a Certified Public Accountant (CPA) in 1984. He earned his Master of Business Administration (MBA) degree from New York University in 1986 and is a member of the New York State Society of CPAs, the Estate Planning Council of New York City, The Society of Trust and Estate Practitioners (STEP), and the Yale Insurance Study Group.

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Registration Form

Luncheon Program Fee:

PEPC Members (In-Person OR Virtual): $45 | Non-Members (In-Person OR Virtual): $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 October 14, 2022

ATTENDEE INFORMATION:

Name: ______________________ Discipline: ______________________
Company: ______________________
Address: ______________________
City, State, Zip: ______________________
Phone: ______________________ Email: ______________________

Membership Type: ☐ PEPC Member ($45 per person) ☐ Non-Member ($65 per person)
Participation Type: ☐ In-Person Meeting ☐ Virtual Meeting

Please select your lunch entrée:

☐ Grilled Swordfish, Coconut Lime Rice, Pureed Sweet Potatoes, Pineapple Salsa
☐ Stuffed Roasted Pepper, Ratatouille "Dirty Rice", Blackened Tofu
☐ 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)*