



## JANUARY HYBRID LUNCHEON PROGRAM

### “SPECIAL NEEDS PLANNING & THE RISE OF DIRECTED TRUSTS”

TUESDAY, JANUARY 17, 2023

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!

This presentation focuses on the increasing use of Directed Trusts in Special Needs Planning. Discussion will center around the benefits of directed powers in drafting, the importance of relying on expertise as a fiduciary, and recent state adoptions and updates concerning the Uniform Directed Trust Act.

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

#### **Speaker:**

Jennifer M. Tindell, J.D. joined Raymond James Trust in 2022 as the Special Needs Trust Manager and has worked in the Estate Planning and Special Needs Trust field since 2010. She comes to Raymond James with experience most recently from Advocacy Trust, LLC, where she was a Regional Trust Director and from Wells Fargo Bank, N.A., in the Estate Settlement and Special Needs Trust Services departments. She is very passionate about her work with helping families navigate the public benefits system and finding a better quality of life for beneficiaries.

Jennifer attended the University of West Florida where she received her B.A. in English Literature graduating magna cum laude. She earned her J.D. along with a Certificate of Concentration in Elder Law in 2015 from Stetson University College of Law, where she was the Editor-in-Chief of the Journal of International Aging, Law & Policy as well as the President of the Florida Bar Young Lawyers Law Student Division. During her time at Stetson, she volunteered with the St. Petersburg Community Law Program and the Wills for Warriors program.

She currently resides in Atlanta, GA, and spends her free time volunteering with organizations focused on inclusion for the disabled community, hiking in the Chattahoochee National Forest, and kayaking.

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 17, 2023 HYBRID LUNCHEON PROGRAM 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 January 13, 2023**

## ATTENDEE INFORMATION:

Name: \_\_\_\_\_ Discipline: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

Participation Type:     In-Person Meeting     Virtual Meeting

Please select your lunch entrée:

Tomato Braised Short Ribs, Parmesan Polenta, Broccolini

Eggplant Napoleon, Spinach Ricotta, Tomato Compote, Haricot Vert

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](http://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](http://www.philaepc.org)

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