



OCTOBER LUNCHEON PROGRAM

“ELDER LAW & SPECIAL NEEDS PLANNING”

TUESDAY, OCTOBER 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 PEPC 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!

Planning for seniors and individuals with disabilities and their families is growing in importance as more Americans are living longer and living with disabilities. This presentation will focus on the nuts and bolts of elder law and special needs planning, including representing clients with diminished capacity, and the use of trusts in elder law and special needs planning. In addition, the SECURE Act made major changes to how estate planners address retirement accounts during the estate planning process. Proposed regulations attempted to clarify certain issues, including how to obtain the stretch for beneficiaries who are disabled or chronically ill and how a trust can qualify for life expectancy payouts. Mr. Krooks will address the interplay between special needs planning and retirement accounts.

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

Speaker:

Bernard A. Krooks, J.D., CPA, LLM (taxation), CELA®, AEP® (Distinguished) is the founding partner of the New York law firm Littman Krooks LLP and chair of its elder law and special needs department. He is the past president of the Arc of Westchester, the largest agency in Westchester County, NY serving people with intellectual and developmental disabilities and their families.

A frequent presenter at the Heckerling Institute on Estate Planning and other national estate planning conferences, Mr. Krooks is past chair of the Elder Law Committee of the American College of Trust and Estate Counsel (ACTEC) and past chair of the Elder Law and Special Needs Planning Group of the Real Property, Trust & Estate Law (RPTE) Section of the American Bar Association. He is past president and fellow of the National Academy of Elder Law Attorneys (NAELA), past president and founding member of the New York Chapter of NAELA, past Chair of the Elder Law Section of the New York State Bar Association, and past president of the Special Needs Alliance, a national invitation-only non-profit organization dedicated to assisting individuals with special needs and their families.

Mr. Krooks, author of numerous articles on elder law and related topics, is chair of the Elder Law Committee of Trusts & Estates Magazine, and serves on the Wolters Kluwer Financial and Estate Planning Advisory Board and the Advisory Committee of the Heckerling Institute on Estate Planning.

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.

OCTOBER 17, 2023 LUNCHEON PROGRAM REGISTRATION FORM

Luncheon Program Fee:

PEPC Members: \$60 Non-Members: \$80

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 13, 2023

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

PEPC Member (\$60 per person) Non-Member (\$80 per person)

Please select your lunch entrée:

Grilled Chicken Breast, Roasted Tomato Farro, Garlic Escarole, Parsley Chicken Jus

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*)