



## JANUARY LUNCHEON PROGRAM

# “UNDUE INFLUENCE: WILL YOU KNOW IT WHEN YOU SEE IT?”

TUESDAY, JANUARY 23, 2024

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!

This program will explore a subject vital to all professionals who deal with estates, trusts, gifts, and the elderly: how to ascertain when undue influence is occurring, and the facts needed prove it. The presentation will include fact patterns for different scenarios and explain how the evidence presented impacts these cases. The materials will provide detailed analyses of law and facts about the case studies from multiple jurisdictions. Attendees will come away more equipped to deal with the increasing, challenging – yet often overlooked – problem of undue influence.

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

### **Speakers:**

**Steven K. Mignogna, Esq.** is a partner with Archer & Greiner and serves as both the Co-Chair of the firm’s Estates and Trusts Group and Chair of the Estate and Trust Litigation Group. Steve specializes in commercial litigation, including litigation involving probate matters, estates, trusts, gifts, fiduciaries, guardianships, and real estate, handling cases in the state and federal courts, at both the trial and appellate levels. Representing both institutions and individuals, Steve’s clients include banks, corporate fiduciaries, investment companies, educational and charitable institutions, and real estate firms, as well as beneficiaries of estates and trusts, executors, trustees, guardians, incapacitated persons, surviving spouses, and persons having an interest in real estate.

**Kelly Preteroti, Esq.** is a skilled and aggressive litigator at Baker, Donelson, Bearman, Caldwell & Berkowitz, PC, who regularly represents corporate and individual fiduciaries and beneficiaries in trust and estate-related disputes. Ms. Preteroti has a national fiduciary litigation practice, handling matters throughout the Firm's footprint. Fiduciary disputes typically arise between individuals or financial institutions acting in a fiduciary capacity (such as a trustee or personal representative) and beneficiaries of a trust or estate. Ms. Preteroti is well-versed in trust and estate law and the nuances of litigating these matters in all venues, which vary from state to state.

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 23, 2024 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 January 19, 2024**

## 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:

- 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*)