



## FEBRUARY LUNCHEON PROGRAM

# “STATE INCOME TAXATION OF TRUSTS: PENNSYLVANIA, NEW JERSEY, DELAWARE, AND BEYOND”

TUESDAY, FEBRUARY 20, 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!

Managing state income taxes is a critical aspect of the estate planning process. If done well, it can produce significant savings. If done poorly, it can result in substantial unnecessary expense and potential liability for attorneys, CPAs, trustees, and other advisers. In this presentation, Dick Nenno and Vince Thomas of Young Conaway Stargatt & Taylor, LLP, in Wilmington, assisted by Bobbie Larkin of Glenmede in Philadelphia, will focus on Pennsylvania, New Jersey, Delaware, New York, and California and will give practitioners everything they need to know about this important subject.

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

### Speakers:

**Richard W. Nenno** is senior counsel with Young Conaway Stargatt & Taylor, LLP, in Wilmington, Delaware. He received his A.B. degree from Princeton University and his J.D. degree from Harvard Law School. Dick, who has over 45 years of trusts and estates experience, speaks and writes nationally on estate planning topics and has written Tax Management Portfolios on *Choosing a Domestic Jurisdiction for a Long-Term Trust* (867-2nd T.M.), *Domestic Asset Protection Trusts* (868-2nd T.M.), and *State Income Taxation of Trusts* (869-2nd T.M.).

**Vincent C. Thomas** is Partner in and Co-chair of Young Conaway Stargatt & Taylor, LLP's Business Planning and Tax Section. He is a Member of the American College of Trust and Estate Counsel (ACTEC) and served as a law clerk to Chief Justice Myron Steele of the Delaware Supreme Court and a Wolcott Fellow for the Delaware Court of Chancery. Mr. Thomas is recognized as a national speaker and authority on the administration of Delaware statutory and common law trusts, as well as complex tax and business transactions for high net worth individuals. He earned an undergraduate degree in Accounting from the University of Delaware, his J.D. degree, magna cum laude, from Widener University Delaware Law School, and his LL.M. in Tax from Villanova University Charles Widger School of Law. Mr. Thomas is admitted to the practice of law in Delaware.

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.

# FEBRUARY 20, 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 February 16, 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:

Pan Seared Salmon with Tomato Fennel Coulis

Penne Pasta, Charred Peppers, Broccoli Rabe, White Beans, Light Garlic Jus

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*)