



American Heart Association®

# Professional Advisor Network

## 10<sup>th</sup> Annual Long Island Trusts and Estates Conference

May 9, 2023

### PROGRAM

TIME	DESCRIPTION	PRESENTERS
8:30 a.m.	Introductory Remarks and Welcome	James (Jim) Meyer JM Planned Giving Solutions
8:33 a.m.	Remarks from Founding Sponsor, Fiduciary Trust Company International	Brian Conboy Managing Director, Trust Counsel Director of Estate Administration Fiduciary Trust International
8:36 a.m.	Remarks from Exhibitor, Doyle New York	Peter Costanzo and Electra Washburn Doyle New York
8:40 a.m.	American Heart Association Mission Speaker	Karen Acompora Co-Founder/President Louis J. Acompora Memorial Foundation
9:00 a.m.	Five Smart Estate Planning Strategies for 2023	Neil D. Katz, J.D., LL.M., CPA Katz Chwat, P.C.
9:50 a.m.	Coffee Break	
10:05 a.m.	Charitable Gift Vehicles & Useful Estate Planning Tools	Neil D. Katz, J.D., LL.M., CPA Katz Chwat, P.C.
10:55 a.m.	Closing Remarks/CLE Evaluation forms	Mark A. Badami, CFP®, CLTC Center for Wealth Preservation
11:00 a.m.	Turn in CLE and Evaluation Forms Program Concludes	

Thank you for being a part of today's event.  
Download all conference materials at [Heart.org/LIMaterials](https://www.heart.org/LIMaterials).

Please Note: CLE and CPE certificates will be emailed to you 5-7 business days after the conference concludes