



American Heart Association.

Professional Advisor Network

10th Annual Long Island Trusts & Estates Conference

Tuesday May 9, 2023 | Nassau County Bar Association



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JOIN NOW



*Together, we can be a relentless force
for a world of longer, healthier lives.*



Heart.org/LIJoinPAN



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*10th Annual Long Island
Trusts & Estates Conference*

5 Smart Estate Planning Strategies for 2023



Presented By:

NEIL D. KATZ, J.D., LL.M., CPA
KATZ CHWAT, P.C.

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FINANCIAL
PLANNING
ASSOCIATION



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LEARN MORE
& REGISTER
HERE!



UPCOMING WEBINAR:



SECURE Act 2.0: QCDs to CRTs and CGAs

Attend this webinar for FREE and earn 1.0 CE credits

Join us for a presentation on the newest opportunities in charitable financial planning: qualified charitable distributions (QCDs) for life income gifts, charitable remainder trusts and charitable gift annuities (CRTs and CGAs).

Wednesday, June 14 | 1:00 p.m. - 2:00 p.m. CT

With guest speaker: Bryan Clontz, Ph.D., CFP®, CAP®, AEP®





Damar Hamlins #3forHeart™ CPR Challenge

Take these 3 simple steps to help save lives.
Learn CPR. Give. Share.



LEARN MORE

Step 1

Learn CPR

Step 2

Give

Donate to the American Heart Association to fund CPR education & training, and other lifesaving programs and scientific research.

Step 3

Share

Tag 3 friends to take the #3forHeart CPR Challenge.



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Charitable Gift Vehicles & Useful Estate Planning Tools



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James Meyer
Planned Giving Solutions



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Thank You to Our Committee

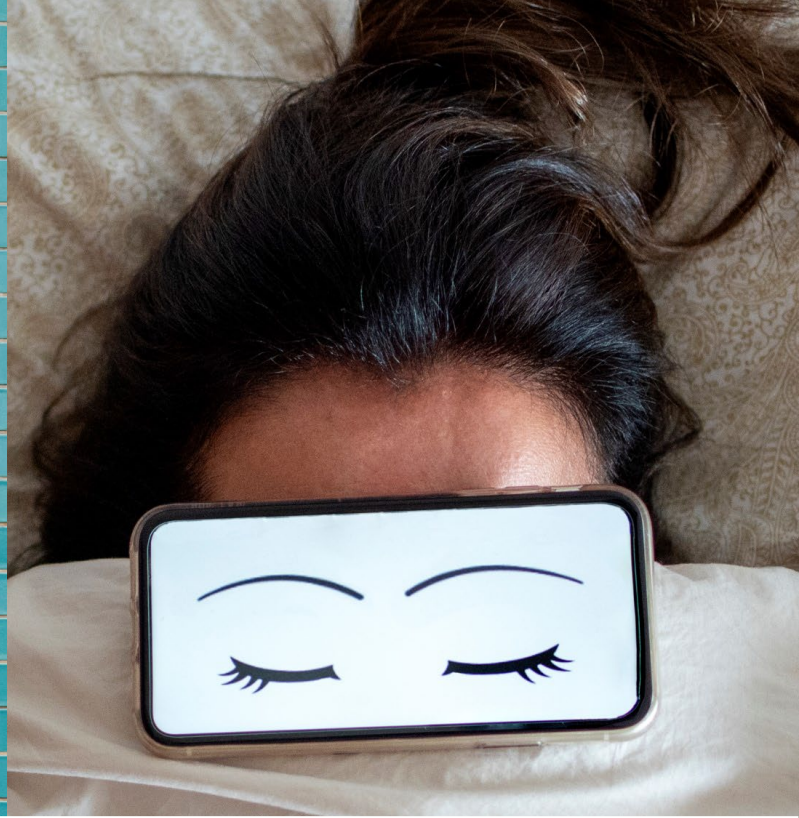
Jacob (Jake) Ivry
Donna Joseph
Eric M. Kramer
Joseph T. LaFerlita
Corey Lev
Judith Wilkens Lev
Jeffrey S. London
James E. Meyer
Frank Petrocelli
Kimberly C. Preston

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Sandra N. Busell
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Deborah S. Barcham
Robert S. Barnett
Shari Davidson
Andrew F.J. Della Ratta
Harvey Feinberg
Arlene K. Haims

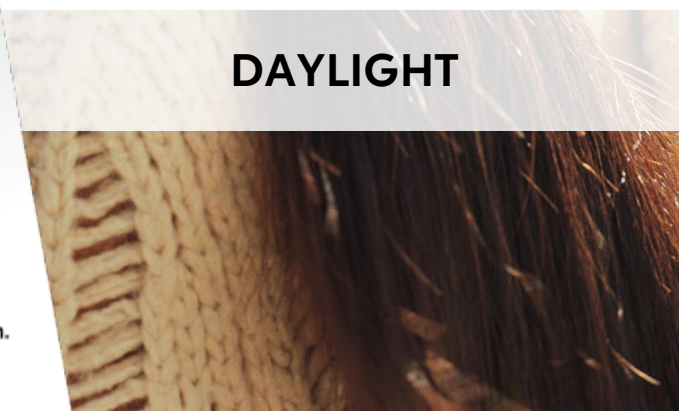
What can you do to get enough sleep?



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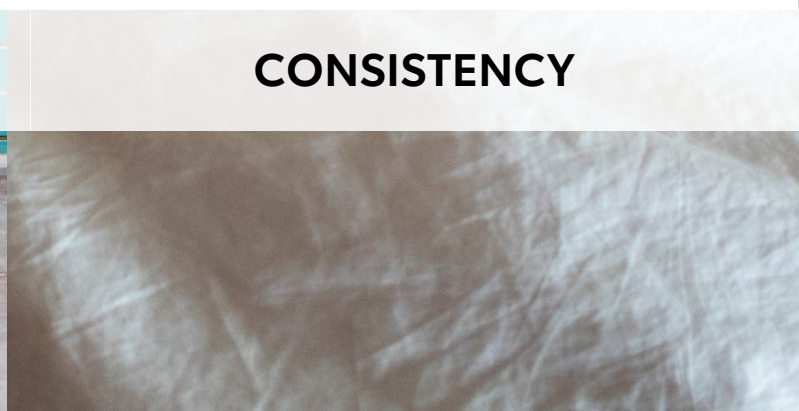
ADD MORE



DAYLIGHT



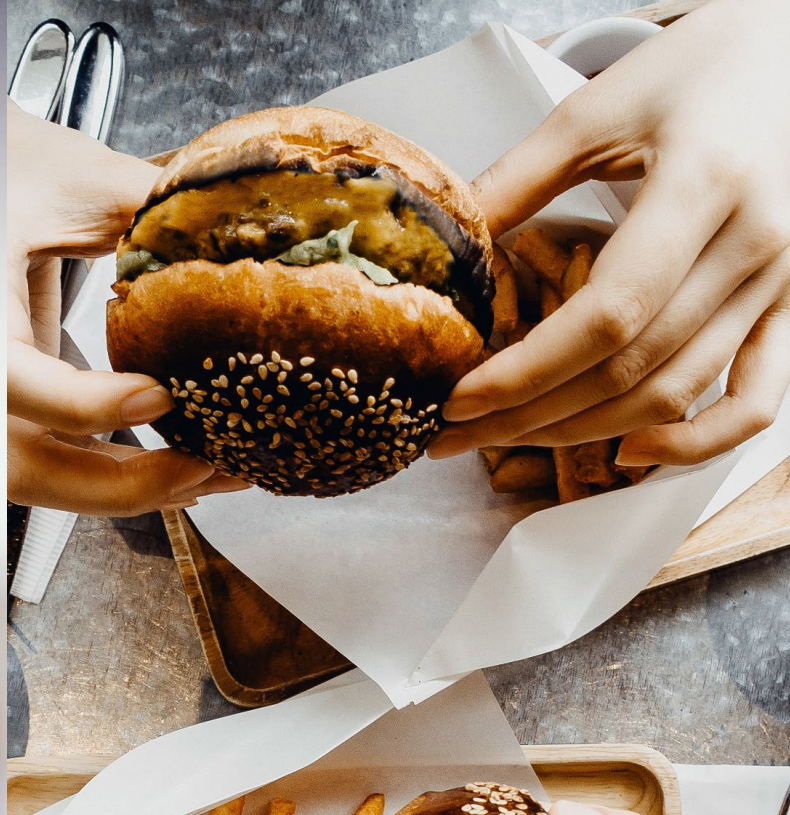
MOVEMENT



CONSISTENCY



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X GET LESS

**NIGHTTIME
ACTIVITY**



**HEAVY MEALS, ALCOHOL,
NICOTINE & CAFFEINE**



**EVENING
SCREEN TIME**





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DOYLE

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TRUE OR FALSE?

When it comes to getting your fruits and veggies, fresh is always best.



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FALSE!

A healthy diet can include fresh, frozen, canned or dried produce.



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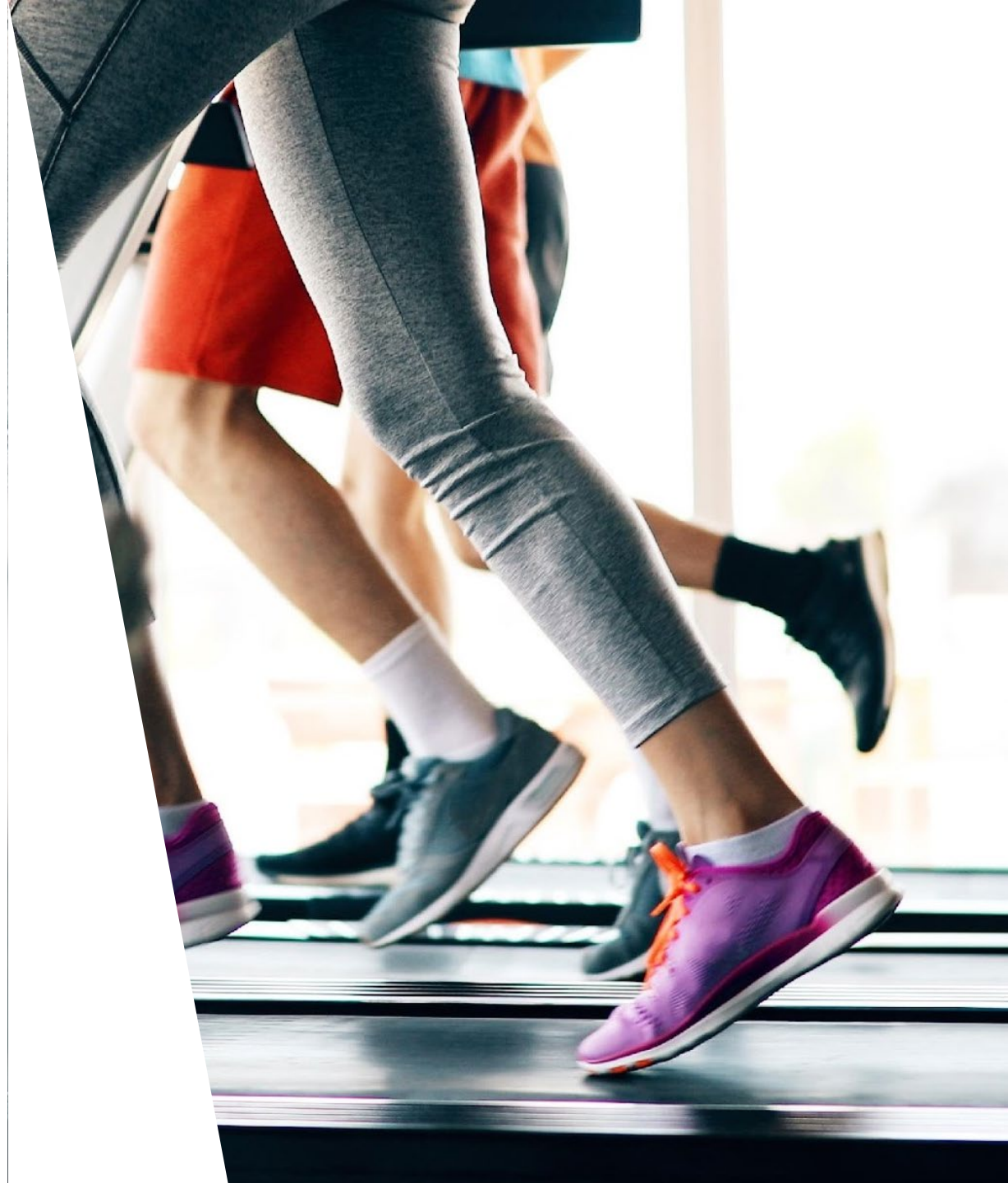


TRUE OR FALSE?

To get enough activity in your day, you need to work out.



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FALSE!

ALL movement counts and can boost your health. You can even break it up over the day.



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