

Market & Legislation Impacts on Planning

Virtual Continuing Education Presentation
for Professional Advisors

Tuesday | October 06, 2020 | 8-10 a.m.

Thank you to
our sponsors
for making this
program possible!

Gold Sponsors:

THE BONADIO GROUP
CPAs, Consultants & More

**Estate Planning Council
of Central New York**

**COLONIAL
CONSULTING LLC**
charting your course.....

NBT Financial Group
TRUST | INVESTMENTS | INSURANCE | RETIREMENT

CE Sponsors:

FPA OF CENTRAL NEW YORK
FINANCIAL PLANNING ASSOCIATION

DB&B
Dermody, Burke & Brown, CPAs, LLC



Prudential

Bring Your Challenges

Lee Gatta, CLU, CLTC, AEP, ChFC

Society of
FSP
Financial Service Professionals

MACKENZIE HUGHES LLP



**CENTRAL NEW YORK
COMMUNITY FOUNDATION**

431 East Fayette Street
Syracuse, NY 13202
315-422-9538 | cnycf.org

Our expert panel of speakers will discuss financial investment trends and charitable giving; the charitable impact of tax law changes such as the Tax Cut & Jobs Act of 2017, the SECURE Act of 2019, and the recent CARES Act; and the effects of the COVID-19 outbreak. Our investment experts will also share their best tax-planning ideas for business owners and other high net worth investors and a market update. Attendees will appreciate valuable takeaways, Q&A opportunities, and continuing education credits.

Virtual via Zoom

There is no charge to attend, but registration is required.

2 Continuing Education credits pending for:

- Continuing Legal Education (CLE) — Difficulty of the course is appropriate for both newly admitted and experienced attorneys. Credits are in the category of Areas of Professional Practice.
- Continuing Professional Education for CPAs (CPE) — Credits are in the category of Advisory Services.
- Certified Financial Planners (CFP)
- Life & Health Insurance Certification (CE)

A certificate of attendance will also be provided for PACE reporting for CAP[®], ChFC[®] and for other self-reported continuing education such as CWS[®] designations. CLE and CPE credits will be awarded by Mackenzie Hughes LLP, a NYS CLE Accredited Provider and a NYS CPE Accredited Provider- Sponsor #002121, with Mary Anne Cody, Esq. as a Moderator.

Register before October 2, 2020. Visit <https://cnycfimpact2020.eventbrite.com> or contact Dara Harper at dharper@cnycf.org.



Marc Penziner

Principal and Financial
Advisor at Bernstein
Private Wealth
Management



Peter Dunn

President and CEO,
Central New York
Community Foundation



Tara Popernik

CFA, CFP, Director of
Research, Wealth Strategies
Group, Bernstein Private
Wealth Management