

Current Developments, Including 12 Action Steps Given a Potential Estate Tax Repeal:

A Morning with Mark Parthemer

This seminar is suggested for professionals who advise clients regarding estate planning or taxation issues. The seminar provides valuable knowledge for estate planning and tax attorneys, accountants, financial planners, retirement planning practitioners, trust officers and other professional trustees.

Mark R. Parthemer is the Managing Director and Senior Fiduciary Counsel at Bessemer Trust. In this role, he is responsible for working with clients and their advisors to develop practical and efficient wealth transfer plans and for guiding the firm on fiduciary issues. He is a member of the firm's Estate Planning and Advanced Implications Modeling Committees.

Prior to joining Bessemer, Mark was a Partner at Duane Morris, LLP. He is a nationally recognized speaker, published author, and quoted in national publications, including *The Wall Street Journal*, *Money Magazine*, *Barron's*, *The New York Times*, and *The Washington Post*. Mark is an ACTEC Fellow and holds leadership positions in the Real Property Trust and Estate Section of the American Bar Association, the Florida Bankers Association, and Synergy Summit. He is an associate editor of the *Journal of Financial Service Professionals*.

Mark earned a J.D. from Dickinson School of Law, as well as a B.A. and B.S. in philosophy and government from Franklin and Marshall College. He is an Accredited Estate Planner, and a member of the Florida and Pennsylvania Bar Associations.

Seminar Schedule

Tuesday, October 17, 2017
Rivers Memorial Hall

Registration

8:00 a.m.

Continental Breakfast Served

Welcome

8:25 a.m.

Mark Worthington, JD, LLM
Western New England University
Director of the Graduate Program in Elder Law
and Estate Planning

Susan A. McCoy '96JD
Cooley Shrair, PC
President, Estate Planning Council of
Hampden County, Inc.

Session

8:30 a.m. - 12:00 noon

Current Developments, Including 12 Action Steps Given a Potential Estate Tax Repeal

Yogi Berra once observed, "In theory there is no difference between theory and practice. In practice there is."

This session will provide a practical and useful review of recent cases, rulings and other developments in the estate tax area. It also will focus on the latest rumblings from Washington, DC regarding the repeal of the estate, gift and GST taxes, explore how repeal could occur, and explain 12 action steps your clients can implement in light of the potential for repeal of one or more of these taxes.

Note: There will be two ten-fifteen minute breaks.

Networking Luncheon

12:00 noon - 1:30 p.m.

Please stay (for as long as your schedule allows) and join Western New England University and our speaker and guest of honor, Mark Parthemer for lunch and an opportunity to mingle with your colleagues and peers within the industry.

Registration Form

COST: \$105.00

\$50.00 for current members of the Estate Planning Council of Hampden County, Inc.

NAME(S)

COMPANY NAME (IF APPLICABLE)

ADDRESS

CITY

STATE

ZIP

PHONE

FAX

EMAIL

Yes, I will be staying for the networking luncheon!

Payment

Check is enclosed

Please check one:

Visa MasterCard Discover American Express

CARD NUMBER

CCV NUMBER

EXPIRATION DATE

CARD BILLING ADDRESS (STREET AND ZIP CODE)

CARDHOLDER'S SIGNATURE

Registration Information

By Mail: Complete and return the attached form by **Wednesday, October 11, 2017**. Please make checks payable to Western New England University and mail to: Advancement Division
Attention: Lina Dias
Western New England University
1215 Wilbraham Road
Springfield, MA 01119-2684

By Telephone or Fax:

Telephone: 413-796-2260 or 800-325-1122, ext. 2260
Fax: 413-782-1450

Cancellation and Refund Policy

Confirmed registrants who wish to cancel must call 413-796-2260 or 800-325-1122, ext. 2260 by Monday, October 16, 2017, to receive a full refund of fees paid, minus a \$5.00 processing fee. Registrants who do not attend and who have not cancelled their registration prior to October 16, 2017 are responsible for the entire fee. Substitutions are welcome. If Western New England University cancels the event due to severe weather, every attempt to reschedule will be made.



Western New England University

Western New England University is a private, independent, coeducational institution founded in 1919. Located on an attractive 215-acre suburban campus in Springfield, Massachusetts, Western New England University serves 3,830 students, including 2,580 full-time undergraduate students. Undergraduate, graduate, and professional programs are offered through Colleges of Arts and Sciences, Business, Engineering, and Pharmacy, and the School of Law.

Directions

From the East and West

(Boston/Albany), via Massachusetts Turnpike (I-90)

Leave the Mass. Pike at Exit 6. Turn left onto I-291. Take Exit 5 off I-291. (Route 20-A West to E. Springfield). Bear right at end of exit ramp. Take left at this light onto Roosevelt Avenue. Take Roosevelt Avenue 2.5 miles to intersection with Wilbraham Road (fifth traffic light). Turn left onto Wilbraham Road and follow Wilbraham Road to intersection with Bradley Road (second light, 1 mile). Turn right onto Bradley Road. Turn left into the gated entrance. Rivers Memorial Hall is on the right just past the Blake Law Center.

From the North

(Northampton/Vermont), via Interstate 91

Leave I-91 at Exit 8, Interstate 291. Take Exit 5B off I-291, "Route 20-A West" (4.3 miles). At first light, take left onto Roosevelt Avenue 2.5 miles to intersection with Wilbraham Road (fifth traffic light). Turn left onto Wilbraham Road and follow Wilbraham Road to intersection with Bradley Road (second light, 1 mile). Turn right onto Bradley Road. Turn left into the gated entrance. Rivers Memorial Hall is on the right just past the Blake Law Center.

From the South

(Hartford/New York City), via Interstate 91

Leave I-91 at Exit 2 (East Longmeadow). Follow signs (Route 83) to the light at the intersection of Longhill and Sumner Ave. Turn right onto Sumner Ave. Travel straight on Sumner Ave. (which becomes Allen St.) to the traffic light at the intersection of Allen St. and Bradley Road (3.2 miles). Turn left onto Bradley Road and follow through one intersection to the gated entrance to Western New England University (1.5 miles). Rivers Memorial Hall is on the right just past the Blake Law Center.

Non-Profit Organization U.S. Postage **PAID** Springfield, MA Permit No. 896

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1215 Wilbraham Road
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Western New England University
Rivers Memorial Hall
1215 Wilbraham Road
Springfield, MA

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B
BESSEMER TRUST

For Legal, Accounting, and Financial Service Professionals

Tuesday, October 17, 2017
8:30 a.m.-12:00 noon
Networking Lunch to Follow
Registration begins at 8:00 a.m.
Rivers Memorial Hall

Sponsored by:
WESTERN NEW ENGLAND UNIVERSITY | **WNE**



This Program is Designed to Qualify for three CLE and CPE credits
Handicapped Accessible