

Trusts and Estates Law Section Annual Meeting

Wednesday, January 28, 2015 New York Hilton Midtown 1335 Avenue of the Americas, New York City
Morning MCLE Program, 8:50 a.m. Grand Ballroom East, 3rd Floor Reception, 12:35 p.m. Grand Ballroom Foyer, 3rd Floor Luncheon, 1:30 p.m. Grand Ballroom East, 3rd Floor Cocktail Reception, 6:00-8:00 p.m. <i>Sponsored by Doyle New York</i> The Century Association 7 West 43rd Street

IMPORTANT INFORMATION

Under New York's MCLE rule, this program has been approved for a total of **4.0 credit hours in areas of professional practice**. This program will NOT qualify for credit for newly-admitted attorneys because it is not a basic practical skills program.

Discounts and Scholarships: New York State Bar Association members and non-members may apply for a discount or scholarship to attend this program, based on financial hardship. *This discount applies to the educational portion of the program only.* Under this policy, any member of our Association or non-member who has a genuine basis for their hardship, if approved, can receive a discount or scholarship, depending on the circumstances. Request for discounts or scholarships must be received by **January 9th, 2015**. For more details, please contact Adriana Favreau in writing at New York State Bar Association, One Elk Street, Albany, New York 12207 or afavreau@nysba.org.

Section Chair

Ronald J. Weiss, Esq.

Skadden, Arps, Slate, Meagher & Flom LLP
New York City

Program Chair

Frank W. Streng, Esq.
McCarthy Fingar LLP
White Plains

Coursebook Editor

Ilene S. Cooper, Esq.
Farrell Fritz, P.C.
Uniondale

Revocable Trusts: Administration & Litigation in New York

8:50–9:00 a.m.	Welcoming Remarks Ronald J. Weiss, Esq. Section Chair	Program Introduction Frank W. Streng, Esq. Program Chair
9:00–9:25 a.m.	Use of Revocable Trusts in Estate Planning (0.5 Professional Practice)	
Speaker:	Michael E. O'Connor, Esq., DeLaney & O'Connor, LLP, Syracuse	
9:25–9:50 a.m.	Funding, Administration, Distribution and Termination of Revocable Trusts (0.5 Professional Practice)	
Speaker:	Karin Sloan DeLaney, Esq., Sloan DeLaney P.C., Baldwinsville	
9:50–10:15 a.m.	Challenges to Revocable Trusts (0.5 Professional Practice)	
Speaker:	Jessica R. Amelar, Principal Court Attorney, New York County Surrogate's Court, New York City	
10:15–10:40 a.m.	Setting Aside Transfers from Decedent to Revocable Trusts through a SCPA 2103 Proceeding (0.5 Professional Practice)	
Speaker:	Gail M. Boggio, Esq., McCarthy Fingar LLP, White Plains	
10:40 - 10:55 a.m.	Refreshment Break	
10:55 - 11:20 a.m.	Contesting Revocable Trusts in Florida (0.5 Professional Practice)	
Speaker:	Jonathan A. Galler, Esq., Proskauer Rose LLP, Boca Raton, FL	
11:20 a.m. - 12:10 p.m.	Plans for a New York Trust Code, Including Provisions on Revocable Trusts (1.0 Professional Practice)	
Speakers:	Professor Ira Mark Bloom, Albany Law School, Albany Professor William P. LaPiana, New York Law School, New York City	

12:10 - 12:35 p.m.

Moderator:

Panelists:

12:35 p.m.

12:35 - 1:30 p.m.

1:30 - 3:00 p.m.

6:00 - 8:00 p.m.

A Model for Litigating Revocable Trusts in New York (0.5 Professional Practice)

Surrogate John M. Czygier, Jr., Surrogate's Court, Suffolk County, Riverhead

Jessica R. Amelar, Principal Court Attorney, New York County Surrogate's Court, New York City

Gail M. Boggio, Esq., McCarthy Fingar LLP, White Plains

Jonathan A. Galler, Esq., Proskauer Rose LLP, Boca Raton, FL

Frank W. Streng, Esq., McCarthy Fingar LLP, White Plains

Program Concludes

Reception - Grand Ballroom Foyer, 3rd Floor

Luncheon - Grand Ballroom East, 3rd Floor

Keynote Speaker: Raymond J. Dowd, Esq., Dunnington, Bartholow & Miller LLP, New York City

Cocktail Reception Sponsored by Doyle New York

To be held at The Century Association
7 West 43rd Street



Accommodations for Persons with Disabilities: NYSBA welcomes participation by individuals with disabilities. NYSBA is committed to complying with all applicable laws that prohibit discrimination against individuals on the basis of disability in the full and equal enjoyment of its goods, services, programs, activities, facilities, privileges, advantages, or accommodations. To request auxiliary aids or services or if you have any questions regarding accessibility, please contact Adriana Favreau at 518-487-5630.



For overnight room accommodations, please call the New York Hilton Midtown at 1-800-445-8667 and identify yourself as a member of the New York State Bar Association. Room rates are \$259.00 for single/double occupancy. You also can reserve your overnight room on the web at www.nysba.org/15accomm. Reservations must be made prior to December 22, 2014.



For questions about this specific program, please contact Adriana Favreau at 518-487-5630. **For registration questions only, please call 518-487-5621. Fax registration form to 518-463-5993.**

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The Century Association
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