

DEAN'S HOUR



YOU CAN'T TAKE IT WITH YOU

Maximize and Protect your Charitable Giving During Your Lifetime



DATE: Monday, November 17, 2014
TIME: 12:00 - 2 p.m. *Buffet Lunch & Discussion*
PLACE: Nassau County Bar Association

1.5 NYMCLE credit hour in professional practice



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As the year-end approaches, many clients are considering ways to maximize their philanthropy and minimize their tax burden. This workshop will review useful strategies, vehicles, and unique benefits and considerations when life insurance is involved. The discussion will include approaches that are appropriate for clients ranging from those moderately active in charitable giving to those who are highly engaged in philanthropy.

PANELISTS

Ellen S. Israelson, Vice President
Marketing & Donor Relations
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New York

Henry Montag, CFP, CLTC
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YOU CAN'T TAKE IT WITH YOU...CHARITABLE GIVING NOVEMBER 17, 2014

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