

## Program Details

**TIME:**

12:30 – 2:10 p.m.

**REFRESHMENTS:**

A light lunch will be served

**LOCATION:** SCBA Center

560 Wheeler Road,  
Hauppauge

**MCLE CREDIT:**

2.0 Professional Practice

**CPE CREDIT:**

2.0 Taxation

**NYS Education Department  
Sponsor #002922**

**INSTRUCTIONAL LEVEL:**

Transitional and Non-Transitional

Accountants – All levels

**PRICING:**

SCBA Member	\$60
Non-Member	\$75
Attorney	

CPAs	\$60
------	------

Printed  
Materials upon  
request

**FINANCIAL AID FOR**

**ATTORNEYS:** Call 631-234-  
5588 for information grants.

**MATERIALS:** \*\*Materials will be  
provided electronically via email.

**This program will be  
recorded and webcast.**

# The Good, The Bad & The Ugly: Annuities in Elder Law Planning

## Thursday, July 26, 2018

### Program Description:

This program will provide a benefit to Elder Law attorneys, Trust & Estate attorneys, and CPAs. The program will present the pros and cons of using annuities in the setting of elder law planning and will also answer practical questions that arise in determining how to advise clients in the use of existing annuities, purchase of a new annuity or termination of existing annuities, all within the context of the current Medicaid statutes and practice in Suffolk County. Tax issues in the payout stage or in the termination of an annuity will also be presented, as well as the use of 1035 tax free exchange rules. The use of trusts in connection with annuities will be discussed.

### Faculty:

Henry Montag, CFP – Toli Center, East  
Aaron Futterman, Esq., CPA – Futterman & Lanza, LLP

### Program Coordinator:

Eileen Coen Cacioppo, Esq.

### Registration Form – Good Bad & Ugly

BY MAIL: Return registration with payment to:

Suffolk Academy of Law, 560 Wheeler Rd., Hauppauge, NY 11788

BY FAX: 631-234-5899 BY PHONE: 631-234-5588 ON-LINE:

<https://www.scba.org/salregform.php>

Name: \_\_\_\_\_

Address: \_\_\_\_\_

E-Mail \_\_\_\_\_ Phone: \_\_\_\_\_

SCBA Member \$60       Non-Member Attorney \$75       CPA \$60

Printed Materials upon request       12-Session Pass       Scholars Club

Method of Payment:  Cash       Check (payable to Suffolk Academy of Law)

Credit Card <https://www.scba.org/salregform.php>

