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FPA FINANCIAL PLANNING ASSOCIATION OF LONG ISLAND

CHAPTER PROGRAM MEETING

Two Presentations by Raymond C. Radigan, J.D.
Managing Director of Trust, U.S. Bank

Trust Decanting in New York
and
How Historic Low Interest Rates Significantly Impact Estate Planning and Fiduciary Investing

Wednesday, February 6, 2013
The Milleridge Inn
585 North Broadway, Jericho, NY 11753

Program Agenda

5:30-6:00 p.m. **Registration and Networking**
Come join your fellow FPA members and share ideas and insights; a special opportunity to meet other fellow members and our Strategic Partners. Open Cash Bar-Bring Plenty of Business Cards!

6:00-6:30 p.m. **Dinner, Chapter Announcements, Presentation by Main Partner**

6:30-7:30 p.m. **Trust Decanting in New York**
In this presentation Mr. Radigan will discuss the relatively new Decanting Statute that became effective in New York in August 2011. He will cover the rules of the statute, what can be accomplished by decanting, the mechanics of decanting, the procedures, the tax consequences of decanting and the issues that remain unsolved.

7:30-8:30 p.m. **How Historically Low Interest Rates Significantly Impact Estate Planning and Fiduciary Investing**
In this presentation Mr. Radigan will discuss how low interest rates have made it extremely difficult when investing in a fiduciary capacity. The best solution for a fiduciary is to take advantage of the total return legislation (i.e. power to adjust or the unitrust option). He will also discuss how certain estate planning strategies (namely the Loan to Family Members, Installment Sales, SCINs, the GRAT, the Sales to a Defective Grantor Trust and the Charitable Lead Trust) work particularly well in a low investment rate environment.

2 CFP® and/or CPA Continuing Education Credits

FEBRUARY 6, 2013 PROGRAM MEETING REGISTRATION FORM

Registrations on or before Feb. 4th:	FPA of LI MEMBERS - $35.00	ALL OTHERS: $60.00
Registrations after Feb. 4th:	FPA of LI MEMBERS: $50.00	ALL OTHERS: $75.00

NAME: _____

EMAIL: _____(to confirm your registration)

FPA Member # _____ Non-Member_____ **CFP Registration #** _____
Needed to Electronically File your CE Credits

TO REGISTER, PLEASE MAIL THIS FORM AND YOUR CHECK PAYABLE TO "THE FINANCIAL PLANNING ASSOCIATION OF LONG ISLAND" TO:
The FPA of LONG ISLAND, 1895 LINCOLN AVE, EAST MEADOW, NY 11554-2522

The Milleridge Inn charges us for every reservation. If you cannot keep your commitment, please call 516-542-2004 to cancel. No shows and those who fail to cancel 24 hours prior to the meeting will be invoiced the set fee.