WEALTH PRESERVATION SYMPOSIUM

Presentation	Speaker(s)
Introduction	Ed D'Agostino
2020 Election: Estate Planning Considerations	**Stephanie Pervez**, Principal, CohnReznick **Joseph Toce, Jr.,** Managing Director, Andersen
Designing Estate Plans That Last Tax changes, latest court decisions, and defensive planning strategies that provide flexibility	**Mark Haranzo**, Partner, Holland & Knight
Planning with Trusts Creative planning techniques with grantor and non-grantor trusts	**Ani Hovanessian**, Partner, Venable LLP **Jonathan Lurie**, Partner, Venable LLP
Trusts and Real Estate Real estate investments held in trusts and estate planning considerations and benefits	**Michael Arlein**, Partner, Patterson Belknap Webb & Tyler **Joseph Anthony**, CEO, Sterling Legacy
Estate Planning & Retirement Assets Retirement assets represent a significant portion of total family assets; considerations to optimize succession plans	**Thomas Pauloski**, National Managing Director for Wealth Planning and Analysis, Bernstein Private Wealth Management **Robert Dietz**, Vice President and Director for Wealth Strategies Group, Bernstein Private Wealth Management
Privacy and Confidentiality, Do They Exist Anymore?	**Kevin Packman**, Partner, Holland & Knight **Mauricio Rivero**, Partner, Akerman LLP
Wrap-Up	**Olivier Garret**, CEO, Mauldin Economics **Kevin Packman**, Partner, Holland & Knight **Ed D'Agostino**, Moderator