



American Heart Association®

Professional Advisor Network

# **21<sup>st</sup> Annual NYC Trusts & Estates Conference**

Wednesday, April 26, 2023 | The University Club



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JOIN NOW



*Together, we can be a relentless force  
for a world of longer, healthier lives.*



**Heart.org/NYJoinPAN**



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# Structuring Effective and Tax-Efficient Testamentary Charitable Gifts



**KAREN T. SCHIELE**

Partner

Carter Ledyard & Milburn LLP



**ALISON POWERS HERMAN**

Partner

Carter Ledyard & Milburn LLP



FINANCIAL  
PLANNING  
ASSOCIATION



American  
Heart  
Association.

# UPCOMING WEBINAR:

LEARN MORE  
& REGISTER  
HERE!



## SECURE Act 2.0: QCDs to CRTs and CGAs

*Attend this webinar for FREE and earn 1.0 CE credits*

Join us for a presentation on the newest opportunities in charitable financial planning: qualified charitable distributions (QCDs) for life income gifts, charitable remainder trusts and charitable gift annuities (CRTs and CGAs).

**Wednesday, June 14 | 1:00 p.m. - 2:00 p.m. CT**

**With guest speaker: Bryan Clontz, Ph.D., CFP®, CAP®, AEP®**





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# Security, Data, and Hackers Oh My!

*(Everything you wanted to ask about cybersecurity but were afraid to ask)*



**ANGELINE CHEN**

Of Counsel  
DLA Piper

Principal  
Cynefin Consulting



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*Scan the QR code here*

**ACCESS  
CONFERENCE  
MATERIALS**





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**2023 NYC**  
***Trusts & Estates Conference***

# Thank You to Our Committee

## Co-Chairs

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Steven B. Shapiro  
Janice M. Smith



# Damar Hamlins #3forHeart™ CPR Challenge

Take these 3 simple steps to help save lives.  
Learn CPR. Give. Share.



LEARN MORE

## Step 1

**Learn CPR**

## Step 2

**Give**

Donate to the American Heart Association to fund CPR education & training, and other lifesaving programs and scientific research.

## Step 3

**Share**

Tag 3 friends to take the #3forHeart CPR Challenge.



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## EXHIBITORS

Bonhams | Christie's | Doyle | Fiduciary Court Accounting Professionals LLC

Midland Trust Company | Sotheby's | South Dakota Trust Company LLC

## FRIENDS OF HEART

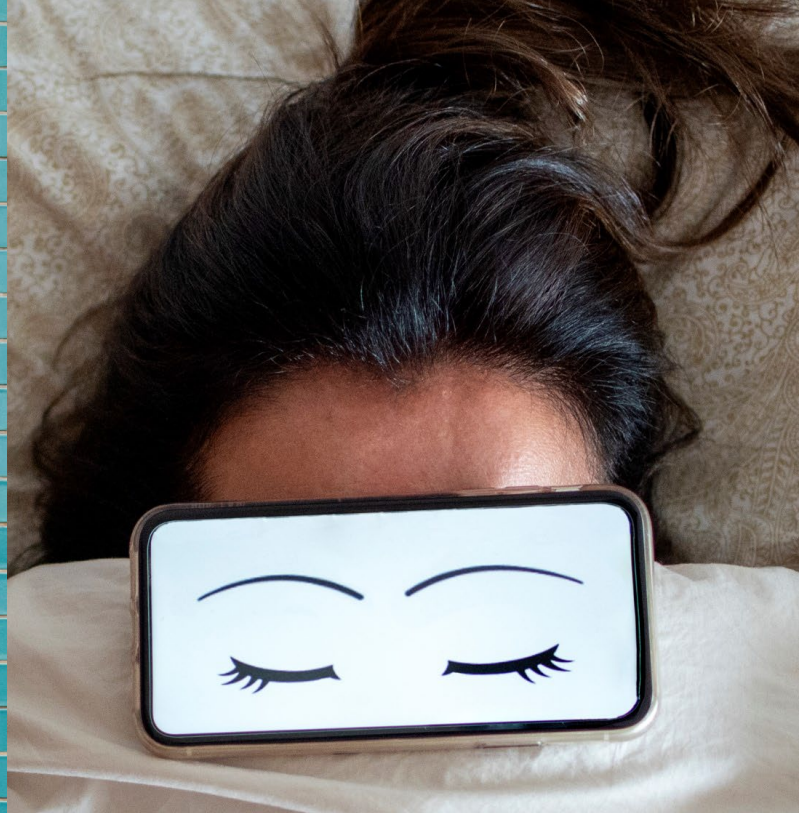
Gary B. Freidman, Esq. | Henry C. & Karin J. Barkhorn Foundation | Jill Miller & Associates, PC | Michael M. Mariani, Esq.

Wertheimer Fredman LLC | William Dunlop and Schnader Harrison Segal and Lewis LLP on behalf of The Helena Segy Foundation

# **What can you do to get enough sleep?**



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**ADD MORE**

**DAYLIGHT**

**MOVEMENT**

**CONSISTENCY**



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Heart  
Association.



**X GET LESS**

**NIGHTTIME  
ACTIVITY**

**HEAVY MEALS, ALCOHOL,  
NICOTINE & CAFFEINE**

**EVENING  
SCREEN TIME**



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**HERITAGE**  
A U C T I O N S

# TRUE OR FALSE?

When it comes to getting your fruits and veggies, fresh is always best.



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# FALSE!

A healthy diet can include fresh, frozen, canned or dried produce.



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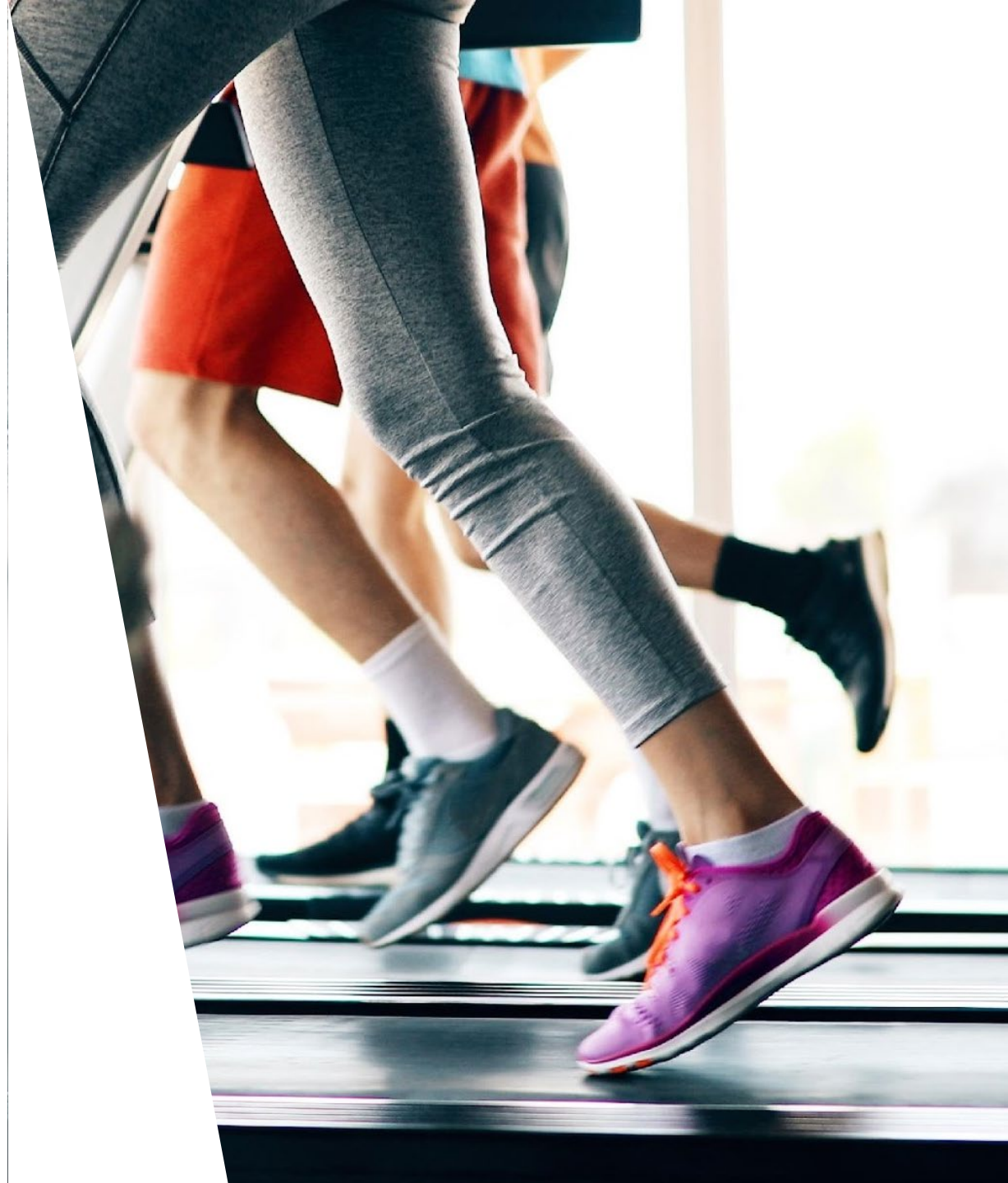
**South Dakota Trust Company LLC**

# TRUE OR FALSE?

To get enough activity in your day, you need to work out.



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# FALSE!

ALL movement counts  
and can boost your  
health. You can even  
break it up over the day.



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