# **Agenda**

## 8:00 a.m. – 9:00 a.m. Registration

Prince Edward Grand Foyer

## Breakfast

Sponsored by: Bessemer Trust

Waterford Room

## 9:00 a.m. – 9:05 a.m. Introduction

## Waterford Room

**Speaker**

**Luke Tashjian**, Cohen and Wolf PC, Westport

## 9:05 a.m. – 10:05 a.m. Opening Plenary

## Sponsored by: Cohen and Wolf PC

## Waterford Room

## **Mountains & Mentors**

(2024FTINE-OP)

**Speaker**

**Hon. Maurice B. Foley**, United States Tax Court, Washington, DC

**Moderator**

**Luke Tashjian**, Cohen and Wolf PC, Westport

## Paralegal Track

1. **Ethics and Confidentiality for Paralegals**

(Paralegal Track) (2024FTINE-P1)

Tavern

**Speakers**

**Wyatt R. Jansen**, Whitman Breed Abbott & Morgan LLC, Greenwich

**Charles W. Pieterse**,Whitman Breed Abbott & Morgan LLC, Greenwich

## 10:05 a.m. – 10:15 a.m. Break

## 10:15 a.m. – 11:15 a.m. Concurrent Seminar 1

1. **Private Placement Memoranda and Investor Pitch Decks: What You Need to Know**

(Tax/Corporate Track) (2024FTINE-1A)

Prince Edward Ballroom A

**Speakers**

**Clifford R. Ennico**, Law Offices of Clifford R. Ennico, Fairfield

**John H. Lawrence, Jr.**, Shipman & Goodwin LLP, Hartford

**Kenneth B. Lerman**, Kenneth B. Lerman PC, Hartford

1. **Tax Aspects of Trust Modifications (Including Decantings) and Settlements**

(Estates and Probate Track) (2024FTINE-1B)

Prince Edward Ballroom B/C

**Speakers**

**Beth Brunalli**, Davidson Dawson & Clark LLP, New Canaan

**Luke Tashjian**, Cohen & Wolf PC, Westport

1. **Networking Including Clients to Avoid**

(Young Attorney Track) (2024FTINE-1C)

Art Gallery

**Speaker**

**Alfred R. Casella**, Murtha Cullina LLP, Hartford

1. **Probate v. Non-Probate Assets, Wills and Revocable Trusts**

(Paralegal Track) (2024FTINE-P2)

Tavern

**Speaker**

**Jeffrey S. Rivard**, Czepiga Daly Pope & Perri LLC, Berlin

## 11:15 a.m. – 11:25 a.m. Break

## 11:25 a.m. – 12:25 p.m. Concurrent Seminar 2

1. **Discussion on Trends in Estate & Gift Tax Controversy**

(Tax/Corporate Track) (2024FTINE-2A)

Prince Edward Ballroom A

**Speakers**

**Spencer Paul**, Deloitte Tax LLP, San Francisco, CA

**Rick Springer**, Deloitte Transactions and Business Analytics LLP, Chicago, IL

1. **The Ins and Outs of Decanting Trusts: Why, How, and the New Connecticut Uniform Trust Decanting Act**

(Estates and Probate Track) (2024FTINE-2B)

Prince Edward Ballroom B/C

**Speaker**

**Abigail D. Apuzzo**, Michael A. Neufeld & Assoc. LLC, Milford

**Lisa Goodrich Page**, Dungey Dougherty PLLC, Greenwich

1. **Medicaid Planning, Including Exemption Amounts, Excluded Assets, and Asset Calculations**

(Young Attorney Track) (2024FTINE-2C)

Art Gallery

**Speaker**

**Ellen R. Sutliffe Hain**, Cohen and Wolf PC,Bridgeport

1. **Probate Court Steps, Checklists, and Forms**

(Paralegal Track) (2024FTINE-P3)

Tavern

**Speaker**

**Sebastian D’Acunto**, Pullman & Comley LLC, Westport

## 12:25 p.m. – 12:35 p.m. Break

## 12:35 p.m. – 1:35 p.m. Lunch and Awards

Waterford Room

1:35 p.m. – 2:35 p.m. Afternoon Plenary  
Waterford Room

**Asset Protection: Selected Issues and Planning Techniques**

(2024FTINE-AP)

**Speaker**

**Gideon Rothschild**, Gideon Rothschild PLLC, New Hartford

## Paralegal Track

1. **Estate Taxation and Fiduciary Income Taxation**

(Paralegal Track) (2024FTINE-P4)

Tavern

**Speaker**

**Deborah J. Tedford**, Tedford Law Firm PC, Mystic

2:35 p.m. – 2:45 p.m. Break

## 2:45 p.m. – 3:45 p.m. Concurrent Seminar 3

1. **Tax Considerations and Traps in LLC Buy-Sell Agreements**

(Tax/Corporate Track) (2024FTINE-3A)

Prince Edward Ballroom A

**Speakers**

**Michael P. Spiro**, Finn Dixon & Herling LLP, Wilton

**Eitan Ulmer**, Finn Dixon & Herling LLP, Stamford

1. **Protectors, Selectors, Substitutors, Oh My: Advanced Trust Drafting**

(Estates and Probate Track) (2024FTINE-3B)

Prince Edward Ballroom B/C

**Speakers**

**Michael T. Clear**, Wiggin and Dana LLP, Greenwich

**Erin D. Nicholls**, Wiggin and Dana LLP, Madison

1. **Special Needs Trusts: What They Can and Cannot Do for the Client**

(Young Attorney Track) (2024FTINE-3C)

Art Gallery

**Speaker**

**Ann L. Fowler-Cruz**, Cohen and Wolf PC,Danbury

1. **Connecticut UTC Notices Including Samples and Forms**

(Paralegal Track) (2024FTINE-P5)

Tavern

**Speaker**

**Cheryl A. Clemens**, Shipman & Goodwin LLP, Hartford

## 3:45 p.m. – 3:55 p.m. Break

## 3:55 p.m. – 4:55 p.m. Closing Plenary Waterford Room

**Attorney-Client Privilege and Other Protections in Tax Examinations**

(2024FTINE-CP)

**Speaker**

**Edward L. Froelich**, McDermott Will Emory, Washington, DC

## Paralegal Track

1. **Fiduciary Accountings**

(Paralegal Track) (2024FTINE-P6)

Tavern

**Speakers**

**Tatiana F. DaSilva**, Cohen and Wolf PC, Bridgeport

**Greta E. Solomon**, Cohen and Wolf PC, Bridgeport

## 4:55 p.m. – 5:00 p.m. Closing Remarks Waterford Room

**Speaker**

**Deborah J. Tedford**, Tedford Law Firm PC, Mystic

**Thank You to Our Sponsors!**



