

## HOTEL RESERVATION INFORMATION



222 Eden Road  
Lancaster, PA 17601  
888-477-7793

Hotel reservations can be made by contacting Eden Resorts or booking online at [www.edenresort.com](http://www.edenresort.com)

The Eden Resort is holding a block of rooms on a first come first serve basis.

**SPECIAL RATES ARE FOR  
RESERVATIONS MADENO LATER  
THAN AUGUST 15, 2021  
*Use code 1515954***

One king bed from \$135 per night  
Two double beds from \$135 per night  
Other options available upon request

The cost of the room and incidentals are not included in the seminar fee. Meals and refreshments as noted on the program are included.

*\*If you require special handicapped accommodations in the lecture hall or a special dietary menu for medical reasons, you must so indicate on the registration form. Special accommodations should also be requested when making hotel reservations.*

Fiduciary Education  
Foundation

P.O. Box 222  
Indiana, PA 15701



## Fiduciary Education Foundation

PRESENTS THE

**2021**

**CONTINUING  
EDUCATION SEMINAR**

**September 14 -17**

**NEW LOCATION:**

**Eden Resorts**

**Lancaster, PA**

## TUESDAY, SEPTEMBER 14<sup>th</sup>

### 5:30 – 8:30 – REGISTRATION & OPENING RECEPTION

#### Financial Services Firms & Their Approach to Medicare Guidance

Danny Streiff – Director Business Development eHealth

## WEDNESDAY, SEPTEMBER 15<sup>th</sup>

### 7:30 – 8:30 - REGISTRATION

### 8:30 – 8:45

#### Opening Remarks - Ernie Petersen - FEF

### 8:45 – 10:15

#### Recent Tax Developments

Charles (Skip) D. Fox IV, Esquire  
McGuireWoods, LLP

### 10:15 – 10:35 BREAK

### 10:35 – 12:00

#### Developments in Fiduciary Litigation

Charles (Skip) D. Fox IV, Esquire  
McGuireWoods, LLP

### 12:00 – 1:15 LUNCH

### 1:15 - 2:15

#### Special Needs Trusts

Liliana Yazno-Bartle, Esq.  
The Law Offices of Caryl Andrea  
Oberman, LLC

### 2:15 - 3:15

#### Ethical Consideration in Closely Held Businesses

Jennifer E Smith, McCollom, D'Emilio, Smith,  
Uebler LLC Attorneys at Law

### 3:15 - 3:35 BREAK

### 3:35 - 4:45

#### Elder Financial Abuse

Tina Kotsalos, Director, Investor Education and  
Consumer Outreach, Dept of Banking & Security

### 5:30 – 6:00 – COCKTAIL RECEPTION

### 6:00 – 7:30 – DINNER – SPEAKER TBA

## THURSDAY, SEPTEMBER 16<sup>th</sup>

### 7:00 – 8:00 – BREAKFAST

### 8:00 – 9:00

#### 4947(a)(1) Nonexempt Charitable Trusts – Compliance, Reporting, and Tax Planning Opportunities

Jacob Zehnder – Senior Manager  
Laurie Adapete – Senior Manager  
Ernst & Young LLP

### 9:00 – 10:00

#### Regulatory and Legal Update

Kari L. Moore – Senior Corporate Counsel  
Federated Hermes

### 10:00 – 10:15 BREAK

### 10:15 – 11:15

#### Economic and Market Update

Bill Ehling, CFA – Market Strategist  
Federated Hermes

### 11:15– 12:15

#### UTA Update

C. Thomas Works  
Stevens & Lee

### 12:15 – 1:30 LUNCH

### 1:30 – 2:30

#### Alzheimer Planning

Julie C. Anderson, CELA  
Trinity Elder Law & Estate Planning

### 2:30 - 3:30

#### Discretionary Distributions

Nora Gieg Chatha, Esq.  
Tucker Arensberg, P.C.

### 3:30 – 3:50 – BREAK

### 3:50 – 4:50

#### Guardianships

Nora Gieg Chatha, Esq.  
Tucker Arensberg, P.C.

## FRIDAY, SEPTEMBER 17<sup>th</sup>

### 7:00 – 8:00 – BREAKFAST

### 8:00 – 9:00

#### Planning for Health Care Costs in Retirement

Jim Entwisle, CFP®  
Advisor Education Specialist  
Vanguard

### 9:00 – 10:00

#### What Did the Pandemic Teach Us About Managing Unique Assets in Fiduciary Accounts

Patrick Alyward – President - ric

### 10:00 – 10:15 BREAK

### 10:15 – 11:15

#### COVID-19: Demographic & Economic Effects

Renee D. Laychur, CFA  
Woodlands Bank

### 11:15– 12:15

#### When You are Trustee for an Incapacitated Person

Anthony Marrone, Esq.  
Harvey, Ballard & Bornstein, LLC

### 12:15 – CLOSING REMARKS

### REGISTER ONLINE AT:

[www.FiduciaryEducationFoundation.org](http://www.FiduciaryEducationFoundation.org)

### CONFERENCE FEE \$450

Payable by Credit Card Online  
or

Make checks payable to:

**FEF**

c/o S&T Wealth Management

PO Box 220

Indiana, PA 15701

Please direct questions to:

**Matthew Valkovci**

**724-465-6869**

[matthew.valkovci@stbank.com](mailto:matthew.valkovci@stbank.com)

