

Tuesday, February 7th, 2023 8:00am - 5:00pm

AGENDA

- 8:00 am - 8:15 am Welcome from EPC of Greater Miami President, Adam Sendzischew
- 8:15 am - 9:05 am **Charitable Trusts and IRAs**
John Spradlin, J.D., LL.M | Tax Managing Director, BDO USA, LLP
- 9:05 am - 9:15 am Break
- 9:15 am - 10:05 am **“Helping Ira Plan His IRA from the IRA”**
George D. Karibjanian | Founding Member, Franklin Karibjanian & Law, PLLC
- 10:05 am - 10:15 am Break
- 10:15 am - 11:05 am **International Estate Planning : Spotting Issues**
Jennifer J. Wioncek | TEP, Practice Group Leader, in the Tax & Wealth Planning Group, Bilzin Sumberg Baena Price & Axelrod LLP
- 11:05 am - 11:15 am Break
- 11:15 am - 12:05 pm **So, Mom has a New “Friend”?! How to Navigate the Ethical Challenges When Representing Clients with Diminished Capacity.**
Elizabeth B. Bowers | Shareholder, Gunster
- 12:05 pm - 1:00 pm Lunch & In-Person Networking
- 1:00 pm - 1:50 pm **Fiduciary Litigation - Common Breaches of Trust**
Ellen S. Morris, Esq. | Member, Cozen O'Connor
- 1:50 pm - 2:00 pm Break
- 2:00 pm - 2:50 pm **Making Lemonade - Planning Techniques in the Current Economy and Market**
Mark R. Parthemer, AEP | Chief Wealth Strategist and Florida Regional Director, Glenmede
- 2:50 pm - 3:00 pm Break
- 3:00 pm - 3:50 pm **Planning with Private Placement Life Insurance**
Russell DeLiberio | Vice President, Goldman Sachs, Consumer & Wealth Management
- 3:50 pm - 4:00 pm Break
- 4:00 pm - 4:50 pm **Tax Controversy - IRS Examinations and Valuation Issues**
Michael Kramarz | Director, Kaufman Rossin Tax Services Advisory Group
- 4:50 pm - 5:00 pm Closing Remarks