



# GREATER NEW JERSEY ESTATE PLANNING COUNCIL, INC.

215 GODWIN AVENUE, #33  
MIDLAND PARK, NJ 07432  
[www.GNJEPC.org](http://www.GNJEPC.org)

## MEETING NOTICE

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### **VICE PRESIDENT**

James R. Strull, Esq.

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Alan Preis, CPA  
Barry N. Shinberg, Esq.

**SPECIAL BREAKFAST EVENT WITH JEROME M. HESCH, ESQ**  
**Wednesday, June 14, 2017 at SEASONS**

**“ The Best Estate and Tax Planning Ideas ...  
And How to Explain Them and Get Clients to Implement Them“**

**Speaker: Jerome M. Hesch, Esq.**

### **Location: SEASONS**

644 Pascack Road  
Washington Township, NJ  
<http://www.seasonscatering.com/>

### **SCHEDULE**

Registration/Breakfast 7:30 a.m.  
Program Begins: 8:15 a.m.  
Program Concludes: 11:00 a.m.\*  
(\*includes mid-morning break)

**Time:** 7:30 a.m. to 11:00 a.m. (3.0 credit course)

**RSVP VIA EVENTBRITE.COM:** <http://gnjepcjune2017.eventbrite.com/>

This is perhaps the biggest and the best Special Estate Planning Event the Greater New Jersey Estate Planning Council has ever had! We are very excited and proud to have none other than Jerome M. Hesch, Esq. as our speaker for our June 14, 2017 special breakfast event. While Jerry needs no introduction, we feel it's a must to tell you about him. Jerry is an attorney, professor, author and speaker on estate planning and tax law. Born in New York, and Florida based for most of his career, Jerry is one of the most respected and most well-known experts in estate and tax planning in the United States. He is one of the most creative minds in our industry and has always been at the forefront of change and creativity in estate and tax planning.

Jerry attended the University of Michigan for his undergraduate and MBA degrees and received a JD from the University of Buffalo Law School. Early in his career, Jerry worked for the Internal Revenue Service in the Office of Chief Counsel in Washington, D.C. He was also a law professor at the Albany Law School and the University of Miami School of Law. Today he serves as the Director of the prestigious Notre Dame Tax & Estate Planning Institute. He is currently an adjunct professor at both the University of Miami School of Law, which is well known for its Heckerling Institute and Estate Planning program and degree, and Florida International University. Jerry is a special tax consultant for several law firms including the Jeffrey M. Verdon Law Group in Newport Beach, CA, and Oshins and Associates in Las Vegas, NV. Jerry is often brought in by other professionals around the country to work on various large, unique and complicated matters.



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Barry N. Shinberg, Esq.

Jerry has authored numerous articles, tax management portfolios and books on estate planning and taxation, including a law school casebook. Jerry is a frequent lecturer on estate and tax planning topics and has presented at the finest national forums and venues in the United States including The University of Miami Heckerling Institute on Estate Planning, the University of Southern California Gould School of Law Tax Institute, and the New York School of Law Institute on Federal Taxation. He is a Fellow in the prestigious American College of Trust and Estate Counsel and is listed in Best Lawyers in America.

Jerry travels the country and works with some of the premier professionals in the United States, and with high-net-worth clients of all types. He is certainly one of the best in the minds of many professionals and clients alike.

We have asked Jerry to design a very special program for us and he will come to New Jersey and spend the morning teaching us many strategies and techniques that we've never seen before. What makes this even more special is that Jerry is also an expert in client relationship management and client communication. He has long been known for being an expert on "explaining" very complex ideas in very simple ways – and getting clients to take action. Jerry also has been at the forefront of inter-changing estate and income tax planning and strategies, which can result in exponential benefits for our clients.

This is a don't miss event! You will leave this event with practical and profitable ideas that you can put to work in your practice and for your clients right away. Whether you are an attorney, an accountant or financial advisor, you are going to get, from the premier expert in the United States, the best of the best ideas and learn how to get clients to implement them.

**Please process your complimentary member ticket via the above link by close of business Monday, June 12, 2017 to reserve your seat.** Guests are always welcome and we encourage council members to invite estate planning colleagues to reserve their ticket which includes breakfast. The special discounted price for a guest ticket is \$100. Applications are pending for continuing education credits for NJ CLE, NJ INS, and CFP (3.0 credits). NJ CPE credits have been approved (3.0 credits). CPAs please refer to page three of the meeting notice for your program notification. **If you wish to receive CE credits you must provide the necessary information and you must sign in and you must sign out at the meeting and attend the full course!**

Thank you and we look forward to seeing you for breakfast on June 14, 2017!

Sincerely,

Ruth B. Kramer, CTFA

President

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**CPE Program Notification Form for CPA's Seeking Credit**

**Program Title:** The Best Estate and Tax Planning Ideas..  
And how to explain them and implement them

**Presentation Date:** June 14, 2017

**Location:** Seasons  
Washington Township, NJ

**Starting Time:** 7: 30 a.m.

**Ending Time:** 11:00 a.m.

**Instructor:** Jerome M. Hesch, Esq.

**Format:** Live Lecture

**Program Level:** Intermediate

**Description of Program:** Estate Planning

**Learning Objective:** Estate Planning

**Requisite Knowledge  
And Experience:** None

**Advance Preparation:** None

**Topic Area(s):** Estate Planning

**Total CPE Hours  
To Be Earned:** 3.0 Credits