

## 2022 PROFESSIONAL ADVISOR SYMPOSIUM

October 18, 2022 in Pittsburgh and October 19, 2022 in Erie

11:30 a.m. – 6:00 p.m.

Duquesne Club, Pittsburgh, PA and Ambassador Center, Erie, PA



11:30am	<b>Registration</b>	
11:45am	<b>Lunch</b>	
12pm	<b>Welcome</b>	
12:15 – 1:15pm	<p><b>Keynote: What Business Owners Want From Trusted Advisors</b>  <i>Pittsburgh Moderator: Aaron Phillips, Decision Associates</i>  <i>Erie Moderator: Christopher Harben, Penn State Behrend Center for Family Business</i></p>	
<b>1:30pm – 3:45pm Breakout Sessions (choices of sessions for 1:30pm and 2:45pm)</b>		
1:30 – 2:30pm	<p><b>#1 – Both Sides of Asset Protection: Are You Protecting Assets or Seeking Them?</b>  <i>Jerome C. Wegley and Guy C. Fustine</i>                      If you need/want to protect your assets, then inevitably there is someone trying to get your assets. This presentation will review the strengths and weaknesses of tried and true asset protection techniques from the point of view of the asset owner, as well as the party seeking to acquire your assets. We will look at techniques for current and future owners of assets and techniques to pierce asset protection vehicles.</p>	<p><b>#2 – Planned Charitable Giving: You Protected and Preserved It. Now What Do You Want To Do With It?</b>  <i>Jeffrey D. Scibetta and Kenzie P. Ryback</i>                      This presentation will provide an overview of different planning techniques that can help clients achieve their philanthropic goals during lifetime and at death. We will consider tax implications and advantages of various forms of charitable giving. We will also discuss the pros and cons of different approaches to planned giving.</p>
2:45 – 3:45pm	<p><b>#3 – Retirement Plans: Old Stand-By for Asset Protection</b>  <i>Nadia A. Havard</i>                      The presentation will review commonly used ERISA covered retirement plan arrangements (such as 401(k), solo 401(k), 403(b), 457(b), profit sharing plans, and cash balance plans); recent case law focusing on court treatment of such assets in bankruptcy context; the interplay between the IRS proposed regulations regarding required minimum distributions under the SECURE and asset protection; and other pointers to minimize creditor exposure.</p>	<p><b>#4 – The Beer Truck Plan: Everyone Needs a Contingency To Protect Their Business Assets</b>  <i>Thomas C. Hoffman, II</i>                      What happens if a business owner has a catastrophic event (such as getting run over by a beer truck) and cannot go into work Monday morning? This presentation will review the minimum planning every business owner should have in place, no matter his/her age. This contingency plan can eventually be replaced by a more formal business succession structure, based on a thoughtful review of company (and often family) dynamics and potential.</p>
4 – 5pm	<p><b>25 Legal Tips in 50 Minutes: An Experiment in Brevity</b>  <i>Alexander Cox, Neal Devlin, Thomas Hoffman, Robert Zaruta and Matthew Lasher</i>                      Fast-paced tips on protecting intangible assets (intellectual property), protecting assets using trusts, protecting yourself after you get served, labor &amp; employment hot topics, and more.</p>	
5 – 6pm	<b>Networking Reception</b>	