GREATER NEW JERSEY ESTATE PLANNING COUNCIL, INC.

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Heckerling 2025 Review and Deep Dive!

Date: Wednesday, February 12, 2025
Time: 9:00 am – 11:30 am
Location: Online (Zoom webinar)
Speaker: Glenn Henkel, J.D., LL.M, CPA and Joy Matak, J.D., LL.M

ONLINE EVENT ONLY! PLEASE NOTE THERE ARE TWO (2) REGISTRATIONS THAT NEED TO BE COMPLETED TO ATTEND THIS EVENT.

Here we are! 2025 is here. The election is over. We see the landscape of Congress. The scheduled sunset provisions are now less than one year away! What else? Now what? The Heckerling Institute on Estate Planning is the nation's premier educational conference for all estate planning professionals, including attorneys, accountants, wealth management professionals, insurance and investment professionals, elder law and special needs specialists, and more! Every January "the best of the best" meet in Orlando, FL, for almost five intense days of nothing but learning and hearing from the country's leading experts in the estate planning industry. From tax and non-tax planning issues, to the most comprehensive coverage of everything going on in the estate planning world, to the legal, economic, and political landscape, the best of the best of it is at Heckerling.

This year is rumored to be bigger and better than ever, and once again, the GNJEPC is excited and honored to once again have back none other than Glenn Henkel, J.D., LL.M, CPA and Joy Matak, J.D., LL.M for a very special event for us! This is going to be a "DON'T MISS" event. Glenn and Joy will be taking the hottest topics and recent developments, topics that were to be discussed at Heckerling, and some other special surprises – and they will be presenting (virtually) to the Greater New Jersey Estate Planning Council. For those of you who remember last year's 2024 Heckerling Review that Glenn and Joy did – it was one of the best events we had. They did an incredible job of presenting the best of the best planning ideas, and everything else that was "need to know" – and they are going to be doing it even bigger and better this year!

Look at what's going on in the world today? The Presidential election is over. The scheduled sunset provisions are less than one year away. Renewed attacks on GRAT's? SLAT's? Dynasty Trusts? What else? While there may be a lot of uncertainty – here's what we are certain of – we've got two of the best in the business giving us a comprehensive presentation on the most important information, ideas, and insights that will come out of Heckerling!

Joy Matak, CPA, JD, LLM, is a Partner at Avelino Law, LLP, in the firm's Private Client Services practice group. With over two decades of diversified experience as a wealth transfer strategist, Joy has an extensive background in recommending and implementing advantageous tax strategies for multigenerational wealth families, owners of closely held businesses, and high net worth individuals. Joy is extremely adept at navigating the intricate landscape of estate and business succession, and she crafts customized wealth transfer strategy plans to accomplish even the most complicated estate and business succession goals. Joy also performs tax compliance work including gift tax, estate tax, and income tax returns for trusts and estates as well as consulting services related to transfer tax planning, asset protection, life insurance structuring, and post-mortem planning. A sought-after resource in her field, Joy frequently shares her insights through speaking engagements for the ABA Real Property, Trust and Estate Law Section; Wealth Management Magazine; and the Society of Financial Service Professionals. Joy is a regular, monthly contributor to Trusts & Estates magazine and has authored and co-authored articles for the Tax Management Estates, Gifts and Trusts (BNA) Journal; Leimberg Information Services, Inc. (LISI); and Estate Planning Review The CCH Journal, among others, on a variety of topics including wealth transfer strategies, income taxation of trusts and estates, and business succession planning. Joy co-authored a book on the 2017 tax reforms entitled Estate Planning: Estate, Tax and Other Planning after the Tax Cuts and Jobs Act of 2017.

Glenn A Henkel, J.D., LL.M., CPA, is a shareholder in the firm Kulzer & DiPadova. He is a nationally known practitioner, lecturer, and author. If you don't know him, you should recognize his name as he has presented at Heckerling numerous times. Glenn focuses on sophisticated tax, estate, and wealth transfer planning and strategies, and his particular areas of expertise include complex estate planning, tax-exempt organizations and Probate, Trust and Estate Law. Glenn is the co-author (with Steven K. Mignogna and Gerard G. Brew) of the "New Jersey Estate Planning Manual: Theory, Practice & Forms." He was also one of the key principals on the NJ Bar Association committee to conform the UTC, as adopted by the Uniform Law Commission to New Jersey law. He is a Fellow of the American College of Trust and Estate Counsel (ACTEC), and is a Past Chair of the Real Property, Trust and Estate Law Section and Past Chair of the Taxation Section of the New Jersey State Bar Association. In addition to being an attorney, Glenn is also a Certified Public Accountant, and brings a unique and expert perspective on tax and estate planning. Glenn has been named a Super Lawyer in New Jersey from 2005- 2020 and for many years was distinguished as one of the 100 Top Super Lawyers in New Jersey, and he has also been named to the "Best Lawyers in America" from 2007- 2020. Glenn has also been designated as an Accredited Estate Planner by the National Association of Estate Planning Councils.

This is a "DON'T MISS EVENT!!!" Make sure you register to attend!

REGISTRATION INSTRUCTIONS:

1. Please register at: https://www.eventbrite.com/e/heckerling-2025-review-and-deep-dive-tickets-1133443332519?aff=oddtdtcreator to reserve your ticket and to let us know your CE requirements.

2. Next, please register for the Zoom Webinar at: https://us02web.zoom.us/webinar/register/WN_PrLdNdN7TtSCJZtqIncuVQ

3. After you RSVP for the Zoom webinar in step 2, you will be sent a reminder with instructions on how to attend the webinar on the day of the event.

NOTE: If you have not renewed for the 2024-25 season, you will need to purchase a non-renewed member ticket or renew your membership ASAP.

Applications are pending for 2.0 continuing education credits for CFP, NJ CLE, and NJ CPE. If you wish to receive CE credits, you must provide the necessary license information, and you must attend the full course.