

The National Planned Giving Department and
New York Regional Office of the Anti-Defamation League

**Cordially Invite you to the Fall 2015
Seminar for Professionals**

Planning for Clients with
under \$10 Million Net Worth,
Including Portability Considerations

Tuesday, October 27, 2015
6:00 p.m. – 8:00 p.m.



Second Century

Presenter



JONATHAN BLATTMACHR, JD, is a Director of Pioneer Wealth Partners, LLC, an independent wealth management firm that offers a comprehensive suite of advisory services to high net worth clients and families. Mr. Blattmachr brings over 35 years of experience in trusts and estates law.

He is a retired member of Milbank Tweed Hadley & McCloy and the Alaska, California and New York Bars. Mr. Blattmachr has been recognized as one of the country's most creative trusts and estates lawyers. He writes and lectures extensively on estate and trust taxation and charitable giving and has authored or co-authored seven books and over 500 articles on estate planning topics. He has served as a lecturer-in-law of the Columbia University School of Law and as an Adjunct Professor of Law at New York University Law School in its Masters in Tax Program (LLM). He is a former chairperson of the Trusts & Estates Law Section of the New York State Bar Association and of several committees of the American Bar Association. Mr. Blattmachr is a Fellow and a former Regent of the American College of Trust and Estate Counsel and past chair of its Estate and Gift Tax Committee. Among professional activities, Mr. Blattmachr has served as an Advisor on The American Law Institute, Restatement of the Law, Trusts 3rd; and as a Fellow and Director of The New York Bar Foundation and as a Fellow of the American Bar Foundation. Mr. Blattmachr graduated from Columbia University School of Law cum laude, where he was recognized as a Harlan Fiske Stone Scholar, and received his A.B. degree from Bucknell University, majoring in mathematics. Mr. Blattmachr served on active duty in the United States Army, reaching the rank of captain, and was awarded the Army Commendation Medal.

Fall 2015 Seminar for Professionals

Planning for Clients with under \$10 Million Net Worth, Including Portability Considerations

With the introduction of portability, planning for married couples with net worth in the \$5–10 million range has reached new heights of complexity. Jonathan Blattmachr will discuss planning techniques for clients in this range that balance the goals of reducing combined estate and GST tax on one hand and maximizing basis in property for income tax purposes on the other, while considering ways to preserve flexibility to choose between the two.

Tuesday, October 27, 2015

Registration and Reception 6:00 p.m. – 6:30 p.m.

Program 6:30 p.m. – 8:00 p.m.

Buffet appetizers and wine will be served.

(Kosher dietary laws observed.)

ADL National Headquarters
605 Third Avenue
(Between 39th and 40th Streets)
New York, NY 10158

*Seating is limited. Due to building security procedures,
advance reservations are required.*

Please register by Friday, October 23rd.

RSVP to Harold Arnwine at 212.885.7873, harnwine@adl.org,
or online at www.adl.org/pacseminar

1.0 CLE Credit and/or 1.0 CPE Credit

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The Anti-Defamation League Foundation, a nonprofit organization, supports the mission of the Anti-Defamation League to "stop the defamation of the Jewish people and to secure justice and fair treatment to all." The Foundation invests and manages all assets gifted to it including bequests, charitable trusts and endowments.

A nonprofit organization, founded in 1913, ADL is the nation's premier civil rights/human relations organization dedicated to combating anti-Semitism, prejudice and bigotry of all kinds, defending democratic ideals and safeguarding civil rights. ADL is a leader in the development of materials, programs and services that build bridges of communication, understanding and respect among diverse groups.

The Anti-Defamation League and Anti-Defamation League Foundation are not financial, legal or tax advisors. Please contact your advisors regarding your financial, legal or tax needs.

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