



Martin M. Shenkman, CPA, MBA, PFS, AEP, JD

Estate Planning – Aging and Long-Term Illness

Planning for someone diagnosed with chronic disease (Parkinson’s disease, multiple sclerosis, Crohn’s, COPD, Alzheimer’s disease, etc.) or who has a loved one living with chronic illness, must be tailored to reflect the challenges disease can create. Each chronic illness is different and planning must be tailored to that particular disease and the person’s experience with that disease (e.g., what is their anticipated disease course). Properly modifying traditional estate and financial planning to address specific nuances of AD, such as using revocable trust, building in safeguards and checks and balances into the planning, can provide better protection. This program will explore many practical ways planning can be adjusted to better protect the person with chronic illness.

Martin M. Shenkman, CPA, MBA, PFS, AEP, JD is an attorney in private practice in Ft. Lee, New Jersey and New York City. His practice centers around estate and tax planning, planning for closely held businesses and estate administration. Mr. Shenkman is the author of 42 books and more than 1,000 articles. He is a member of the Editorial Board of *Trusts & Estates Magazine*, CCH (Wolter’s Kluwer), and the *Matrimonial Strategist*. His writings have garnered several awards and nominations – notably, his article entitled “Estate Planning for Clients with Parkinson’s” received the Editor’s Choice Award in 2008 from *Practical Estate Planning Magazine* and his book, *Estate Planning for People with a Chronic Condition or Disability*” was nominated for the 2009 *Foreword Magazine Book of the Year Award*.

Mr. Shenkman holds a Bachelor of Science degree from the Wharton School, an MBA from the University of Michigan and a JD from Fordham University School of Law.

Join us on **Wednesday, January 27, 2021**

4:00 PM – 4:30 PM **Virtual Social Networking.**

4:30 PM – 6:00 PM **Zoom Meeting**

FREE for Preregistered Members \$35 for Preregistered Guests

Virtual Meeting – Pre- Registration Required

Reservation needed by January 15, 2020

Pay by credit card – <http://www.123signup.com/calendar?org=sfepc>

or send a check with names to: SFEPCC – 767 Brannan Place – Concord, CA 94518

MCLE: This activity is approved for MCLE credit of one hour by the State Bar of California & CFP®.

Excused Absence: Members can request an excused absence by mailing a letter, or sending an email (SFEPCC@astound.net) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.