

The Salvation Army to Host Virtual Estate and Charitable Gift Planning Institute in May

27th Annual Symposium Guides Professional Advisors in Achieving Clients' Philanthropic Goals

WEST NYACK, NEW YORK, UNITED STATES OF AMERICA, April 11, 2022 /EINPresswire.com/ -- [The Salvation Army USA Eastern Territory](#) is once again hosting a free symposium for attorneys,

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Michael Freeman, Director of Gift Planning for The Salvation Army

financial planners, and other professional advisors. This year’s event will take place on Tuesday, May 17th, and will be virtual, so that participants can attend from a place of their convenience. The program scheduled from 9:00 am until 3:25 pm will offer continuing education credits, including CPE, CTFA, CFP, CLE, and CE for Insurance. Those interested can register by May 16th at TSALegacy.org/advisors.

“This is a great way to stay up-to-date on new tax laws impacting charitable donations,” said Michael Freeman, Director of Gift Planning for The Salvation Army in Cleveland, Ohio. “There have never been more tools and

resources than there are now for individuals looking to maximize short and long-term plans for charitable contributions. With options like charitable remainder trusts, different types of gift annuities, trusts, donor-advised funds, and others, there are tremendous opportunities for folks to accomplish their legacy goals,” continued Freeman.

This year’s symposium will feature industry experts including:

- Jack N. Alpern, founder and shareholder in the Warren, Ohio law firm of Jack N. Alpern Co., L.P.A. Mr. Alpern has presented estate planning seminars on behalf of financial institutions for attorneys throughout Eastern Ohio. Most recently, he has served as an instructor for Chautauqua Institution in western New York, teaching a course entitled, “The Inheritance We Leave to Our Heirs...a Blessing or a Curse.”
- Steve Hartnett brings a broad range of educational and professional experiences to the Academy. Mr. Hartnett has practiced estate planning in a large law firm, managed a closely held business, and taught law in both academic and professional settings.
- Barry H. Zimmer, founder of the Zimmer Law Firm (est. June 1993), is a specialist in the areas of Estate Planning, Estate Administration, and Business Succession Planning. His goal was and

continues to be to help clients understand and de-mystify the often-confusing world of Estate Planning in an ever-changing society and to implement effective Estate Planning with minimal effort and time investment.

- Heather J. Rhoades serves as Chairman of Cummings & Lockwood's Private Clients Group and is Partner in Charge of the West Hartford office. She practices in the areas of estate planning, estate settlement, trust administration, and charitable planning.

Heather is a member of the Firm's National Charitable Planning Group.

- Conrad Teitell is a principal in the Connecticut and Florida law firm of Cummings & Lockwood, based in the firm's Stamford office. Teitell chairs the firm's National Charitable Planning Group. He is an adjunct professor (Masters Graduate Program in Estate Planning) at the University of Miami School of Law and has lectured in all 50 states on taxes and estate planning.



"Not only will participants gain a deeper understanding of how to meet their clients' philanthropic needs, but they will also be able to ask questions of our panelists, who are some of the nation's top estate planning attorneys," said Freeman.

Topics covered will include:

- Session I: "To Trust, or Not to Trust"
- Session II: "Hypo-Ethicals"
- Session III: "Specific Case Law and Situations for Charitable Estate Planning"
- Session IV: "Watch Your Step and Current Changes in Tax and Estate Planning Law"
- Session V: Wrap-up Discussion/Q&A

For more information about The Salvation Army's gift planning tools, or to make a donation, visit [TSALegacy.org](https://easternusa.salvationarmy.org/eastern-territory/) To learn more about our services and how we are helping neighbors in need, visit <https://easternusa.salvationarmy.org/eastern-territory/>

About The Salvation Army

The Salvation Army annually helps more than 30 million Americans overcome poverty, addiction, and economic hardships through a range of social services. By providing food for the hungry, emergency relief for disaster survivors, rehabilitation for those suffering from drug and alcohol abuse, and clothing and shelter for people in need, The Salvation Army is doing the most good at over 7,000 centers of operation around the country. In 2021, The Salvation Army was ranked #2

on the list of "America's Favorite Charities" by The Chronicle of Philanthropy. For more information about supporting The Salvation Army or your local service centers, visit <https://easternusa.salvationarmy.org>. Follow us on Twitter @SalvationArmyUS and #DoingTheMostGood.

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