

Estate Planners Day 2026 Announces Agenda, Expert Speakers, and Registration for May 13th

EPD 2026 brings top legal and financial advisors to NYC on May 13 to tackle estate tax changes, asset protection, and AI ethics. CE credits available.

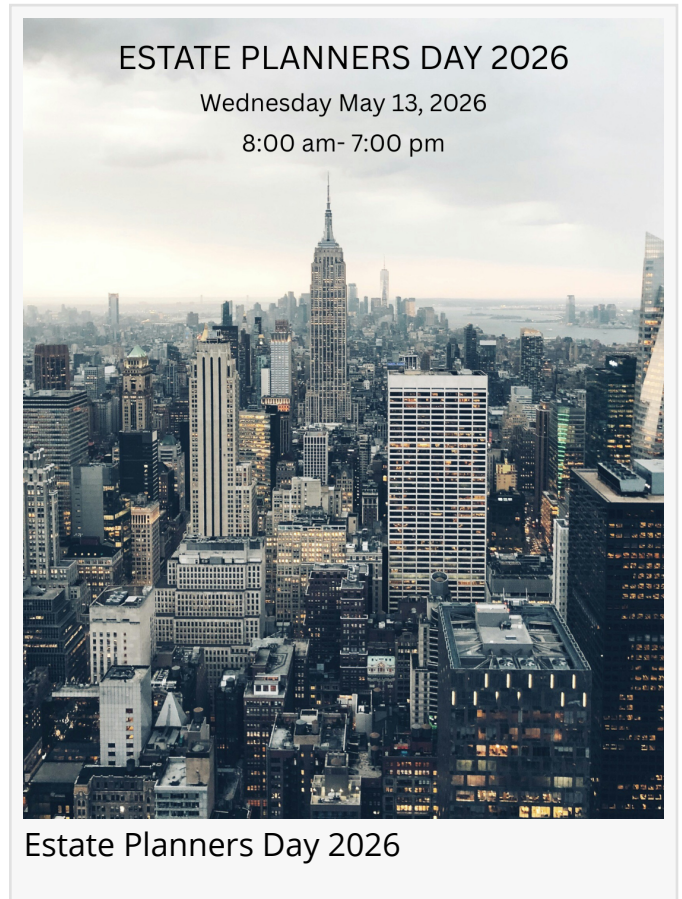
NEW YORK CITY, NY, UNITED STATES, May 5, 2026 /EINPresswire.com/ -- Estate planning professionals, attorneys, CPAs, and financial advisors are invited to attend the highly anticipated [Estate Planners Day \(EPD\) 2026](#). Scheduled for Wednesday, May 13, 2026, from 8:00 AM to 7:00 PM at the historic Union League Club in New York City, this premier educational and networking event promises to deliver critical insights into the evolving landscape of estate planning, tax law, and fiduciary accounting.

EPD 2026 is designed to equip practitioners with actionable strategies to navigate complex legal, financial, and technological shifts. Attendees will have the opportunity to earn highly sought-after Continuing Education (CE) credits, including CFP, CLE, and CPE, ensuring they maintain their professional credentials while staying at the forefront of industry developments.

The conference features a robust lineup of industry-leading experts who will tackle the most pressing issues facing practitioners today. The 2026 agenda highlights include:

How to Protect a Will from Attack: Amy Altman (Partner, Greenfield Stein & Senior, LLP) will guide planners on safeguarding wills against contests, focusing on undue influence, capacity, and forgery, along with best practices for bulletproof documentation.

Planning for Trusts: Tax and Fiduciary Accounting: Francine R.S. Lee and Damien Martin (Managing Directors, Ernst & Young) will navigate the complexities of Fiduciary Accounting



Income (FAI) versus Distributable Net Income (DNI), common pitfalls, and massive incoming tax changes under the proposed legislative acts.

Practical AI, Cybersecurity & Ethical Considerations: Marty Shenkman (Partner, Shenkman Tietz) will address the ethical obligations, cybersecurity risks, and practical considerations of utilizing generative AI in legal practices, warning of the dangers of free AI models.

Successor Trustees and Section 672(c): Stephen Liss (Partner, Dungey Dougherty PLLC) will examine IRS Revenue Rulings regarding successor trustees and offer practical drafting guidelines to prevent estate tax inclusion.

Estate Planning Potpourri: Gideon Rothschild (Senior Counsel, Moses Singer) will explore advanced asset protection strategies, including basis planning, upstream planning, and Domestic Asset Protection Trusts (DAPTs).

When Estate Plans Meet Divorce: Evan Schein and Jacqueline Newman (Partners, Berkman Bottger Newman & Schein, LLP) will discuss the intersection of estate planning, prenuptial agreements, and divorce, focusing on the valuation of family businesses.

The day will kick off with registration and a networking breakfast with exhibitors at 8:00 AM. Following a full day of comprehensive sessions and a catered lunch, the event will conclude with closing remarks and a cocktail networking reception starting at 5:15 PM.

Conference registration is currently open. The registration fee is \$350 for Members and \$450 for Non-Members. Understanding the importance of accessibility and continuing education, the organizers are offering tuition assistance based on financial hardship. Individuals with genuine financial hardship may apply in writing no later than five working days prior to the program to be considered for assistance.

Event Details at a Glance:

Date: Wednesday, May 13, 2026

Time: 8:00 AM – 7:00 PM

Location: The Union League Club, 38 East 37th Street, New York, NY 10016

Registration: Members \$350 | Non-Members \$450

CE Credits Available: CFP, CLE, CPE

For registration, tuition assistance applications, or more information, please contact event coordinator John Prefer at John@BVEventsGroup.com.

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