



You are invited to attend the

2024 Cannon Estate Planning Teleconference Series

The teleconference will begin at 1:00 PM EST and
will run until 2:30 PM EST

Location:

Oppenheimer & Co. Inc.
666 3rd Avenue, 13th Floor
New York, NY 10017

*To ensure you enjoy your
lunch, we recommend you
arrive by 12:30 PM.*

TOPICS AND DATES

January 23, 2024

Spousal Lifetime Access Trusts - A
Fleeting Opportunity

February 20, 2024

State Income Tax Issues with Trusts

March 19, 2024

Deep Dive into Disclaimers

April 23, 2024

Shelter from the Storm - Anticipating
and Avoiding Breach of Fiduciary Duty
Claims

May 21, 2024

Marital Agreements from A to Z

June 18, 2024

Ethics Issues in a Contemporary
Estate Planning Practice

July 23, 2024

Nuts and Bolts of Trust Terminations

August 20, 2024

Addressing the Estate Planning
Needs of Modern-Day Clients

September 17, 2024

Multi-Faceted Conflicts Among Trust
Beneficiaries, Trustees, the IRS and
the Courts

October 22, 2024

Durable Powers of Attorney - An
Essential Estate Planning Component

November 12, 2024

Repair or Replace? The Deficient
Trustee

December 10, 2024

Application of Legal Ethics Rules
When There's No Attorney-Client
Relationship

**To RSVP for this event, contact your
Oppenheimer & Co. Inc. Financial Professional.**

Oppenheimer & Co. Inc. Transacts Business on All Principal Exchanges and Member SIPC. 6168571.1

In order to be awarded the full credit hours, you must be present registering your attendance and departure on the attendance sheets at the registration desk. For additional information regarding CPE Credits or complaint resolution or cancellation, please contact Jerry Wolf at (212) 667-4218 or jerry.wolf@opco.com. There is no fee to attend this conference. Oppenheimer & Co. Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

