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## 2017 PROFESSIONAL ADVISOR SYMPOSIUM

Thursday, October 26, 2017 in Erie (Ambassador Center)
or
Thursday, November 9, 2017 in Cranberry Township (Hilton Garden Inn)

11:30 a.m. – 6:00 p.m.

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>11:30am</td>
<td>Registration</td>
<td>Erie: Hemingway Ballroom</td>
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<tr>
<td>11:45am</td>
<td>Buffet Lunch</td>
<td>Erie: Hemingway Ballroom</td>
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<tr>
<td>12pm</td>
<td>Welcome</td>
<td>Erie: Hemingway Ballroom</td>
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| 12:15 – 1:15pm| **Keynote Address**: The Cost of Ransomware  
*Martin Millner, Vice President of Professional Services, Synergy IT Solutions**  
APPROVED: 1.0 for CPA (PA, NY & OH), Pending approvals: PA, NY & OH Insurance.  
N/A for CFP; CTFA/CRSP.  
Erie: Hemingway Ballroom  
*In person in Erie; Recording in Cranberry Township* |
| 1:30 – 5pm    | Breakout Sessions                        | **Room 1**  
Grantor Trusts Explained: Trusts You Can’t Trust  
Jeffrey D. Scibetta, Esq.  
Reviews the definition, types, uses and funding of Grantor Trusts. Specific provisions will be reviewed, as well as drafting tips and tax implications.  
APPVD: 1.0 for CPA (PA, NY & OH), CFP, Ins. (PA & NY); also 1.25 for CTFA & CRSP. Pending approval: OH Insurance.  
**Room 2**  
Pay Me Now, or Pay Me Later: Resolution and Exit Strategies to Avoid Litigation  
Jerome C. Wegley, Esq.  
Discusses financial and tax risks and damages caused by poor planning for exit strategies and ownership structures of small business.  
APPVD: 1.0 for CPA (PA, NY & OH), CFP, Ins. (PA & NY); also 1.25 for CTFA & CRSP. Pending approval: OH Insurance.  
**Room 3**  
Buying or Selling a Business For the First Time: Navigating Uncharted Territory  
Elliott J. Ehrenreich, Esq. and Frances A. McCormick, Esq.  
Explores practical questions, answers and areas of concern you and your clients may have when contemplating buying or selling a business.  
APPVD: 1.0 for CPA (PA, NY & OH), CFP, Ins. (PA & NY); also 1.25 CTFA & CRSP. Pending approval: OH Insurance. |
| 2:45 – 3:45pm | So Now You Are a Trustee: What’s Next?  
Thomas C. Hoffman, II, Esq. and Nadia A. Havard, Esq.  
Highlights the major issues and complexities to consider when acting as a trustee for yourself or someone else.  
APPVD: 1.0 for CPA (PA, NY & OH), CFP, Ins. (PA & NY); also 1.25 CTFA & CRSP. Pending approval: OH Insurance.  
**Room 2**  
Common HR Issues in the Professional Workplace: All In a Day’s Work  
Mark T. Wassell, Esq.  
Provides legal and practical advice on common human resource issues, specifically for principals and office managers.  
APPVD: 1.0 for CPA (PA, NY & OH) + Ins. (PA & NY); Pending approval for OH Insurance. N/A for CFP and CTFA/CRSA.  
**Room 3**  
Buying Business Assets Out of Bankruptcy: Everyone Wants a Good Deal  
Guy C. Fustine, Esq.  
Your clients could be missing out on opportunities to buy assets at a discount. This program discusses the benefits and potential risks.  
APPVD: 1.0 for CPA (PA, NY & OH) and CFP. Pending approvals: PA, NY & OH Insurance. N/A for CTFA/CRSA. |
| 4 – 5pm       | Living Wills: What Happens in the World of Medicine  
*Ferdinando L. Mirarchi, D.O., FAAEM, FACEP; Chief Medical Officer at Institute on HealthCare Directives*  
Moderated by Jerome C. Wegley, Esq. and Thomas C. Hoffman, II, Esq.  
Living wills have become a nationwide patient safety risk. Understand why, and learn how to mitigate the risk.  
APPVD: 1.0 for CPA (PA, NY & OH), CFP, and Ins. (PA & NY). Pending approval: OH Insurance. N/A for CTFA/CRSA.  
**Room 2**  
**Room 3**  
**Room 3** |
| 5pm           | Cocktail Hour                            | Erie: Hemingway Ballroom  |