

# *You're Invited*

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## **Educational Forum and Conversation with Professionals**

HOSTED BY

# **Morgan Stanley**

2 Jericho Plaza  
Jericho NY 11530

**Monday May 14<sup>th</sup>, 2018**  
**6:00 PM – 8:00 PM**

### **FEATURED SPEAKERS & TOPICS**

#### *Family Wealth Management*

Christopher Rice, CRPC®, CDFA®  
Morgan Stanley  
Senior Vice President  
[christopher.rice@ms.com](mailto:christopher.rice@ms.com)

#### *2018 Updates in Elder Law and Estate Planning*

Aaron Futterman, CPA, Esq.  
Futterman & Lanza, LLP  
Smithtown, NY  
[www.trustedattorneys.com](http://www.trustedattorneys.com)

#### *Surviving a NYS Residency Audit*

Karen Tenenbaum, Esq., LL.M., CPA  
Tenenbaum Law, P.C.  
Melville, NY  
[www.litaxattorney.com](http://www.litaxattorney.com)

Please RSVP by Thursday May 10<sup>th</sup>, 2018 to Sharyn at 631-979-4300  
or via email at [somara@trustedattorneys.com](mailto:somara@trustedattorneys.com)

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There will be no discussion of, or distribution of written materials relating to, specific products or investments at this presentation.

*Opinions expressed by the guest speaker are solely her own and do not necessarily reflect those of Morgan Stanley.*

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