

7th ANNUAL SENIOR LAWYERS CONFERENCE

Moderator/Speaker

Gary N. Skoloff, Esq.
Skoloff & Wolfe, P.C. (Livingston)

Speakers

Ash Ahluwalia, NSSA, CSSCS, CFR®
*National Social Security Partners, LLC
(New Brunswick)*

Cecilia W. Blau, Esq.
Law Offices of Cecilia W. Blau (Springfield)

Robert D. Borteck, Esq.
Robert D. Borteck, P.C. (Livingston)

Greg Cooke
USI Affinity (Philadelphia, PA)

Peter A. Greenbaum, Esq.
*Wilentz, Goldman & Spitzer, P.A.
(Woodbridge, Eatontown; New York City;
Philadelphia, PA)*

Jeremy Hampton
AXA Equitable (Secaucus)

Kathleen Hedden, RN, BSN
Horizon BCBSNJ (Farmingdale)

William John Kane, Esq.
*New Jersey Lawyers Assistance Program
(New Brunswick)*

Ellen C. Marshall, Esq.
*Greenbaum, Rowe, Smith & Davis LLP
(Roseland; Iselin)*

Gregory J. Roberts, CRPC®
*Morgan Stanley Wealth Management
(Lawrenceville)*

Michael A. Saponara, CPA/ABV, J.D., M.A.
*Financial Research Associates
(Edison; New York City; Bala Cynwyd, PA)*

Paula Garra Sawyer, Esq., RN, BSN
*New Jersey Lawyers Assistance Program
(New Brunswick)*

Michael F. Schaff, Esq.
*Wilentz, Goldman & Spitzer, P.A.
(Woodbridge, Eatontown; New York City;
Philadelphia, PA)*

Robert P. Sica, Ph.D., FACP
(Neptune, Lakewood)

S0945.16



© 2016 New Jersey State Bar Association. All rights reserved. Any copying of material herein, in whole or in part, and by any means without written permission is prohibited. Requests for such permission should be sent to NJICLE, a Division of the New Jersey State Bar Association, New Jersey Law Center, One Constitution Square, New Brunswick, New Jersey 08901-1520.

Table of Contents

	<u>Page</u>
Law Firm Transition and Winding Up Your Practice PowerPoint Presentation Michael F. Schaff, Esq. Peter A. Greenbaum, Esq.	1
Part 1: Background	4
Part 2: Winding Up the Practice	6
Part 3: Slowing Down/Part-Time Employment	18
“Law Firm Breakup: What You Need to Know When Dissolving the Entity” Michael F. Schaff Peter A. Greenbaum	25
Retirement Challenges and Considerations Jeremy Hampton	29
Estate Planning for Lawyers Robert D. Borteck, Esq.	31
Who Are Lawyers for Purposes of Estate Planning?	31
Asset Analysis	31
Tax Considerations	31
Gift Planning	31
Estate Planning Documents	31
Social Security Income Maximization Planning PowerPoint Presentation Ash Ahluwalia, MBA, CFP®, NISSA, CSSCS	33
Time’s Running Out on Social Security Ash Ahluwalia, MBA, CFP®, NISSA, CSSCS	45
Social Security: It’s a Women’s Issue Ash Ahluwalia, MBA, CFP®, NISSA, CSSCS David Buckwald, CFP®, CLU, ChFC, CLTC, NISSA	47
Social Security Benefits Update: Are You Leaving Money on the Table? Ash Ahluwalia, MBA, CFP®, NISSA, CSSCS	51
Transitioning Your Practice: The Mind, the Money, and the Rules PowerPoint Presentation Greg Cooke	53

A Few Reasons Why Coping with Dementia is So Challenging PowerPoint Presentation Paula Garra Sawyer, Esq.	59
Neuropsychological Perspective Robert B. Sica, Ph.D., FACPN	69
Identification	69
Case Presentation (Esq./M.D. Similarity)	69
Place of Clinical Neuropsychology in the Care of the Senior Attorney	69
Recap of Main Points	69
Embracing the Warren Buffett Within You Retirement Planning PowerPoint Presentation Michael A. Saponara, CPA/ABV, CFF, J.D.	71
Medicare 101 What You Should Know as You Turn PowerPoint Presentation Horizon	97
About the Panelists...	105