U.S. TRUST
Bank of America Private Wealth Management

U.S. TRUST INVITES YOU TO A BREAKFAST AND THOUGHT-PROVOKING DISCUSSION

DIVORCE
Unsettling the Marital Estate, Financial and Tax Plans

HOSTED BY

Peggy Goldfarb
Private Client Advisor
U.S. Trust

FEATURING

Randi L. Rubin
Partner
Klehr Harrison Harvey Branzburg LLP

Kimberly A. Dula
Partner
Friedman LLP

Alexander Sanford
Senior Trust Officer
U.S. Trust

TUESDAY, APRIL 25, 2017

8:00 a.m. - Registration and Breakfast
8:30 a.m. - Opening Remarks and Panel Discussion
10:00 a.m. - Conclusion

DAVIO'S PHILADELPHIA

Director's Room
111 South 17th Street
Philadelphia, Pennsylvania

The favor of a reply is requested by Wednesday, April 19, 2017 to Bill Donnell at 610.567.2225 or bill.donnell@ustrust.com.

Approval for PA CLE/CPE credit pending

ABOUT THE EVENT

With real examples, our session will examine the unwinding of estate, financial and tax planning when couples divorce. While we all counsel our clients on prenuptial tax, estate and financial planning relevant to marriage, there are also considerations for refiguring all the plans with the dissolution of a marriage. Peggy Goldfarb, Private Client Advisor and Managing Director at U.S. Trust requests the honor of your company for a panel discussion offering both CPE and CLE credit. Our panel will feature Alexander Sanford, Vice President and Senior Trust Officer at U.S. Trust; Randi Rubin, Partner at Klehr Harrison Harvey Branzburg LLP and Kim Dula, CPA, Partner at Friedman LLP.

ABOUT THE SPEAKERS

Randi L. Rubin
Randi Lynne Rubin is a family law attorney whose primary objective is to achieve her clients' goals with compassion and zealous advocacy. Randi's family law practice includes divorce, support, premarital counseling, equitable distribution, custody, protection from abuse and adoption. She negotiates prenuptial, postnuptial and property settlement agreements. Randi litigates in courts in Bucks County, Chester County, Delaware County, Montgomery County and Philadelphia County in Pennsylvania and throughout southern New Jersey.

Kimberly A. Dula
Kim Dula is a partner at Friedman LLP with over 25 years of experience. She provides tax planning and compliance services to Friedman's high net worth individual clients and their closely-held businesses and private foundations. Kim also provides her clients with consulting and compliance services required to fulfill their estate, gift and fiduciary needs.

Alexander Sanford
Alexander Sanford is a Vice President and Trust Officer at U.S. Trust. In this role, Alex is responsible for ensuring U.S. Trust's fiduciary duties are faithfully executed, for understanding the circumstances of clients and providing them with appropriate solutions, and for the administration of investment management and trust accounts. Prior to joining U.S. Trust in 2012, Alex practiced law with the law firm of Cozen O'Connor in Philadelphia, where he provided estate planning and wealth management legal services to high net worth clients. Alex earned his Juris Doctorate from the University of Pennsylvania Law School, and his Bachelor of Arts degree from Temple University, where he majored in History. Alex is a member of the Philadelphia Estate Planning Council and is admitted to the bar of the Supreme Court of Pennsylvania. Note: Alex Sanford does not provide legal advice in his role at U.S. Trust.