New York State Bar Association
Trusts and Estates Law Section
International Law Section

22nd Annual Sophisticated Trusts and Estates Law Institute
Martinique New York on Broadway
49 W. 32nd Street | New York, NY 10001

Wednesday, November 18, 2026 | 8:30 a.m. – 5:00 p.m.
Thursday, November 19, 2026 | 8:30 a.m. – 5:00 p.m.

16.0 Total MCLE Credits
(9.0 Credits Areas of Professional Practice; 1.0 Ethics; 6.0 Skills)

TBD Total CPE Credits

This program is transitional and is suitable for all attorneys including those newly admitted.

Day 1 – Wednesday
Domestic Topics

8:30 a.m. – 9:00 a.m.	**Registration & Continental Breakfast**
9:00 a.m. – 9:10 a.m.	**Introduction and Overview** Moderator: Joshua S. Rubenstein, Katten Muchin Rosenman, LLP, New York, NY
9:10 a.m. – 10:25 a.m.	**1. Estate Planning Update – Review of 2026 Federal Developments** Speaker: David Pratt, McDermott Will & Emery, Boca Raton, FL *1.5 MCLE Credits (Areas of Professional Practice)* *1.5 CPE Credits (Taxation)*
10:25 a.m. – 11:15 a.m.	**2. State of the States** Speaker: Sharon L. Klein, Wilmington Trust Company, New York, NY *1.0 MCLE Credit (Areas of Professional Practice)* *1.0 CPE Credit (Advisory Services – Social Environment of Business)*
11:15 a.m. – 11:30 a.m.	**Break**

11:30 a.m. – 12:45 p.m.

3. Estate Litigation Update

Speaker:
Charles T. Scott, Greenfield Stein & Senior LLP, New York, NY

1.5 MCLE Credits (Areas of Professional Practice)
No CPE Credit

12:45 p.m. – 2:00 p.m.

Luncheon

1:10 p.m. – 2:00 p.m.

4. Ethical Issues in Trusts and Estates

Speakers:
William T. Hennessey, Gunster, Yoakley & Stewart, P.A.,
West Palm Beach, FL

1.0 MCLE Credit (Ethics)
No CPE Credit

2:00 p.m. – 2:50 p.m.

5. Fiduciary Best Practices: Managing Conflicts Through Best Practices in Trust & Estate Administration

Speakers:
Paulina Mejia, Fiduciary Trust International, New York, NY
Brian Conboy, Fiduciary Trust International, New York, NY
Kim Rescorla, Fiduciary Trust International, New York, NY

1.0 MCLE Credit (Areas of Professional Practice)
1.0 CPE Credit (Advisory Services – Finance)

2:50 p.m. – 3:40 p.m.

6. Insurance Update

Speaker:
Todd Steinberg, Loeb and Loeb, Baltimore

1.0 MCLE Credit (Areas of Professional Practice)
1.0 CPE Credit (Advisory Services–Business)

3:40 p.m. – 3:55 p.m.

Break

3:55 p.m. – 4:45 p.m.

7. Developments in Modern Parentage

Speaker:
William P. LaPiana, Professor, New York Law School, New York, NY

1.0 MCLE Credit (Areas of Professional Practice)
No CPE Credit

4:45 p.m. – 5:00 p.m. **Question & Answer**

5:00 p.m. **Reception | Grand Foyer**

Day 2 – Thursday
International Topics

8:30 a.m. – 9:00 a.m. **Registration & Continental Breakfast**

9:00 a.m. – 9:10 a.m. **Introduction and Overview**

Moderator:
Joshua S. Rubenstein, Katten Muchin Rosenman, LLP, New York, NY

9:10 a.m. – 10:25 a.m. **1. U.S Taxation of Foreign Trusts – What You Need to Know**

Speaker:
Kathryn von Matthiessen, Katten Muchin Rosenman, NY

1.5 MCLE Credits (Skills)
CPE Credits (Pending)

10:25 a.m. – 11:15 a.m. **2. Is the Grass Greener Here? -- Pre-Immigration Planning**

Speaker:
Dina Kapur Sana, Day Pitney, NY

1.0 MCLE Credit (Skills)
CPE Credits (Pending)

11:15 a.m. – 11:30 a.m. **Break**

11:30 a.m. – 12:45 p.m. **3. Is the Grass Greener Elsewhere? Moving Assets, Moving Yourself and Expatriating**

Speaker:
Elena Scemama [she is picking a co-speaker. Please check with her]

1.5 MCLE Credits (Skills)
CPE Credits (Pending)

12:45 p.m. – 2:00 p.m. **Luncheon**

1:10 p.m. – 2:00 p.m. **4. Competing for Wealth -- Favorable Foreign Tax Regimes**

Speakers:
Alessandro Bavila, Maisto, Milan
Hanna Brazzo, Baer & Karrer, Zurich
Nuno Cunha Barnabe, Abreu, Lisbon

1.0 MCLE Credit (Areas of Professional Practice)
CPE Credits (Pending)

2:00 p.m. – 2:50 p.m. **5. Stranger Things -- Creation of Foreign Trusts in the U.S.**

Speakers:
David Warren, Bridgeford Trust, NY
Roberto Viceconte, Eisner Amper, NY

1.0 MCLE Credit (Skills)
CPE Credits (Pending)

2:50 p.m. – 3:40 p.m. **6. Oops, I Did It Again -- Ability to Amend Foreign Trusts**

Speakers:
Jeffrey Elkinson, Bermuda
Gilead Cooper KC, Wilberforce Chambers, London?

1.0 MCLE Credit (Skills)
CPE Credits (Pending)

3:40 p.m. – 3:55 p.m. **Break**

3:55 p.m. – 4:45 p.m. **7. Stranger in a Strange Land -- Foreign Property Regimes**

Speakers:
Dr. Christian von Oertzen, FGS, Berlin
Line-Alexa Glotin, UGGC, Paris

1.0 MCLE Credit (Areas of Professional Practice)
CPE Credits (Pending)

4:45 p.m. – 5:00 p.m. **Question & Answer**

5:00 p.m. **Adjournment**