



BLUSTEIN, SHAPIRO,  
FRANK & BARONE LLP

ATTORNEYS AT LAW



## ESTATE PLANNING AND STRATEGY - PANEL DISCUSSION

*Hosted by KeyBank, PKF O'Connor Davies  
and Blustein, Shapiro, Frank & Barone*

### EVENT DETAILS

**Date:** Tuesday, January 27

**Time:** 5:30 - 7:30 p.m.

**Location:** Aspire Brewing, 600 N Galleria Dr.,  
Middletown, NY 10941

### AGENDA

- 5:30 – 6:15 p.m. Networking
- 6:15 – 7:15 p.m. Panel Discussion
- 7:15 – 7:30 p.m. Wrap-up/Networking

## ESTATE, WEALTH AND TAX PLANNING

**Networking and Panel Discussion for High-Net-Worth Individuals and  
Business Owners**

We invite you to join KeyBank, PKF O'Connor Davies and Blustein, Shapiro, Frank & Barone for a panel discussion on Estate Planning and Strategizing.

### MODERATOR AND PANELISTS



**Amy  
Lattimer**  
Area Retail  
Leader, VP  
KeyBank



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**Matthew  
Simmers**  
Relationship  
Manager  
KeyBank



Scan Me



**Elisha  
Brestovansky**  
Director  
PKF O'Connor  
Davies



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**Megan R.  
Conroy**  
Partner  
Blustein, Shapiro,  
Frank & Barone



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**RSVP:** [KeyBank Wealth Event – Fill out form](#)

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