



BLUSTEIN, SHAPIRO,
FRANK & BARONE LLP
ATTORNEYS AT LAW

PKF
O'CONNOR
DAVIES
ACCOUNTANTS AND ADVISORS

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



Matthew Simmers
Relationship Manager
KeyBank



Elisha Brestovansky
Director
PKF O'Connor Davies



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



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

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