

**GREATER NEW JERSEY
ESTATE PLANNING COUNCIL**
www.GNJEPC.org

CPE Program Notification Form for CPA's Seeking Credit

Program Title: The Best Income, Estate and Charitable Planning Ideas, Strategies and Techniques For 2026 and Beyond!

Presentation Date: Thursday, July 23, 2026

Location: Bacari Grill (800 Ridgewood Rd; Township of Washington, NJ 07676)

Starting Time: 11:30 am

Ending Time: 2:00 pm

Instructor: Jeremiah ("Jere") W. Doyle IV, Esq.; National Director, Estate and Tax Planning, for BNY (BNY/Mellon) Wealth

Format: Seminar (Live)

Program Level: Intermediate

Description of Program: Estate/Retirement Planning, Tax

Learning Objective: Estate/Retirement Planning, Tax

Requisite Knowledge And Experience: None

Advance Preparation: None

Topic Area(s): Estate/Retirement Planning

Total CPE Hours To Be Earned: 2.0 Credits