
Trusts & Estates Planning Updates: What You Need to Know for 2023 & Beyond

December 13, 2023

Business law seminar series

Join Flaster Greenberg PC and Marcum LLP for a monthly Business Law Seminar Series.

The educational sessions will focus on topics that have an impact on most businesses in New Jersey and Pennsylvania, including updates on recent and pending legislative and administrative actions.

Our one-hour programs are geared toward business owners and business executives, and the professionals who advise them: accountants, financial advisors, bankers, and investors. Attendees will also have the opportunity to network with other business owners and professionals, and earn CLEs and CPEs.

TITLE & DESCRIPTION

Trusts & Estates Planning Updates: What You Need to Know for 2023 & Beyond

The current tax environment and recent legislative updates offer both opportunities as well as challenges for business owners and wealthy individuals. But, with looming estates and tax changes ahead, taking action now could be advantageous.

The panelists for this seminar will cover estate planning for closely-held business owners and high-net-worth individuals including:

- Gifting strategies and uses of various trusts.
- Asset protection and asset preservation.
- Succession strategies and what business owners who plan to sell or leave the business should know.
- Relocating to a tax-friendly state like Florida.
- Reasons to prepare now

PRESENTERS

David Neufeld, Esq., Shareholder, Trusts & Estates Practice, Flaster Greenberg PC

Courtney Dolaway, Esq., Shareholder, Trusts & Estates Practice, Flaster Greenberg PC

Christi Gallagher, CPA, Partner, Marcum LLP

DATE & TIME

Wednesday, December 13 | 8:15 a.m. - 10:15 a.m.

Continued

LOCATION

Marcum LLP

601 Route 73 North, Third Floor

Marlton, NJ 08053

AGENDA

Registration and Breakfast: 8:15 a.m. - 8:45 a.m.

Presentation: 8:45 a.m. - 9:45 a.m.

Additional Networking: 9:45 a.m. - 10:15 a.m.

CLE

1 NJ and PA CPE available.

1 Substantive PA CLE available.

Hosted by:

ATTORNEYS MENTIONED

Courtney Dolaway

David Neufeld