
Leveraging Trusts for Income Tax, Estate Tax and Asset Protection Before the 2025 Tax Law Changes

September 25, 2024

BUSINESS LAW SEMINAR SERIES

Join Flaster Greenberg PC 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.

SEMINAR DESCRIPTION

- An Overview of Various Types of Trusts
 - Purposes and Protections
 - Tax Treatment and Benefit
 - PA's Law Change on Grantor Trusts
- A Survey of Sophisticated Trust Strategies Before the Law Sunsets in 2025

PRESENTERS

Jonathan Ellis, Shareholder, Trusts & Estates, Flaster Greenberg PC

Steven Poulathas, Shareholder, Tax and Business & Corporate Law, Flaster Greenberg PC

DATE & TIME

Wednesday, September 25 | 8:30 a.m. - 10:30 a.m.

LOCATION

Caffe Aldo Lamberti
2011 Marlton Pike West
Cherry Hill, NJ 08002

AGENDA

Registration and Breakfast: 8:30 a.m. - 9:00 a.m.

Presentation: 9:00 a.m. - 10:00 a.m.

Additional Networking: 10:00 a.m. - 10:30 a.m.

Continued

CLE

1 NJ and PA CPE pending.

1 Substantive PA CLE pending.

RSVP

RSVP here.

ATTORNEYS MENTIONED

Jonathan Ellis

Steven Poulathas