

NJCPA: Estate Planning Techniques to Consider Before the Upcoming Change in Law Takes Effect or If Current Law is Extended

May 7, 2025

New Jersey Society of Certified Public Accountants (Atlantic/Cape May Chapter)

OVERVIEW:

This program will address techniques to use and lock in the estate credit before approximately 50% of it vanishes at the end of 2025 (or possible later day if current law is extended).

This program will include a discussion of SLATs, IDGTs, QPRTs, ILITs, BDITs, and other techniques, and will address the related estate, income (including balancing basis step-up vs. estate tax savings, as well as grantor v. non-grantor status of the trust techniques), and generation skipping tax planning.

DATE:

May 7, 2025

TIME:

8:30 a.m. - 10:30 a.m.

LOCATION:

Atlantic City Country Club, One Leo Fraser Drive, Northfield, NJ 0825

PRESENTED BY:

- Courtney Dolaway, Shareholder, Trusts & Estates
- Steven Poulathas, Co-Managing Shareholder, Business & Corporate Law / Tax
- Alan Zuckerman, Shareholder, Business & Corporate Law / Tax

DESIGNED FOR:

CPAs

CREDITS:

2 CPE Credits in Tax

COST:

Continued

- **\$75.00** - Member
- **\$125.00** - Nonmember

REGISTER:

Please register and pay through NJCPA's website.

NJCPA Website

ATTORNEYS MENTIONED

Courtney Dolaway

Steven Poulathas

Alan Zuckerman