

## Tax Reform Seminar Series, Part VII: Tax Benefits of Qualified Opportunity Zone Funds

---

May 7, 2019

### TAX REFORM SEMINAR SERIES

#### EFFECTIVE STRATEGIES TO TAKE ADVANTAGE OF THE TAX CUTS & JOBS ACT

### PART VII: Tax Benefits of Qualified Opportunity Zone Funds

The word is out about Qualified Opportunity Zone Funds (QOZF) and just about every accountant, financial advisor and real estate professional is interested in how this IRS sanctioned program works. Investing in a QOZF provides all Americans with a way to save money on their taxes and provides real estate developers with a great angle to raise money for their projects. But how do these investment vehicles work? Are there exclusions? Who can utilize a QOZF and what are the benefits?

During this seminar, corporate and tax law attorneys **Peter Spirgel** and **David Neufeld** as well as Charles Lynch and Paul Robertson from Bernstein Private Wealth Management will analyze and discuss the intricacies of QOZF investing and the tax-saving benefits that come along with it.

#### What you will learn:

- How a QOZF works and who can benefit
- What the investment community is doing in response to the new Act
- Tax savings of QOZF
- Qualifications of forming a QOZF
- How to raise capital for a QOZF
- What options are available for these types of funds?
- What happens when the QOZF ends in 2028?
- Would cannabis-related businesses be eligible to qualify for the QOZF tax incentives?

#### Speakers:

- **David Neufeld**, Shareholder, Corporate, Tax, and Trusts & Estates Practice Groups, Flaster Greenberg PC
- **Peter Spirgel**, Shareholder, Corporate, Tax, and Trusts & Estates Practice Groups, Flaster Greenberg PC
- **Charles Lynch**, Principal & Investment Advisor, Bernstein Private Wealth Management
- **Paul Robertson**, Senior Portfolio Manager, Bernstein Private Wealth Management

*Continued*

---

**Date & Time:**

Tuesday, May 7, 2019

Registration and Networking: 8:00 – 8:30 a.m.

Seminar and Q&A: 8:30 – 10:00 a.m.

**Location:**

Flaster Greenberg PC

1810 Chapel Ave West

Cherry Hill, NJ 08002

**Credits:**

Attorneys: 1.5 substantive Pennsylvania CLE credits (NJ reciprocal)

CPAs: 1.5 PA and NJ CPE credit

**Facebook Live:**

Not able to make it in person? You'll still be able to attend the presentation via Facebook Live! Tune into FG's Facebook Page on May 7th at 8:30 a.m. to hear from our panelists as they navigate through the new law and help you identify the strategy that best suits your business.

\*Please note that attendees must be present in-person to be eligible for Pennsylvania and New Jersey CPE credit and substantive Pennsylvania CLE credit.

**ATTORNEYS MENTIONED**

David Neufeld