



Join us VIRTUALLY on September 22nd

EPCLV Annual Meeting

Is Estate Planning Dead...

For those who are not subject to the estate tax?

Presented by **Steven Siegel**, President of The Siegel Group, a Morristown, NJ-based national consulting firm, specializes in tax consulting, estate planning and advising family business owners and entrepreneurs. He holds a B.S. from Georgetown University, a J.D. from Harvard Law School, and an LL.M. in Taxation from New York University. He is author of "The Grantor Trust Answer Book"



He will be discussing the high transfer tax exclusions which would seem to make sophisticated estate planning unnecessary for many clients whose estates will not exceed the taxation thresholds. But there are many other considerations that should go into an estate plan including portability, income tax considerations and asset protection concerns that make "simple" planning a risk for many clients. Life insurance, retirement plans, existing estate plans, gifting and many other issues may need to be considered differently when advising clients in this new world of estate planning.

The newly enacted SECURE Act and CARES Act, along with the combination of the sunset of the 2017 Act after 2025 and possible "political risk" before then, makes advising clients in 2020 of critical importance.

LOCATION

Virtual Platform

SCHEDULE

2:00 PM - 2:15 PM - Annual Meeting

2:15 PM - 4:15 PM - Program Speaker

REGISTER for this event online by **September 14th** at:

<https://www.epclehighvalley.org>

EPCLV Members - FREE

Guests & Future Members - \$25.00



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