

“Tax & Estate Planning Update for 2020”

Date: Thursday, January 16, 2020 **Time:** 9:00 am – 11:00 am **Format:** Lecture – 2.0 hours
Presenter: Bob Bradshaw, CPA & Richard Chamberlain, Attorney
Location: Brandywine Country Club, 6904 Salisbury Rd, Maumee, OH 43537 **Phone:** 419-764-4387

PROGRAM DESCRIPTION:

This presentation is intended to provide attendees with the 2020 income tax update as well as current estate and trust planning concepts. It will also provide attendees with the information they need to help clients understand the current tax law changes and how it will affect them and provide information regarding estate planning in 2020 including the use of trusts for tax and non-tax reasons and strategies for dealing with irrevocable trusts.

PROGRAM OUTLINE

The following time components have been assigned to this topic to allow the presenters sufficient time to cover the subject matter.

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| I. | Federal Tax Update | 9:00 – 10:00 am |
| | a. TCJA | |
| | b. Section 199A and entity structure | |
| | c. Specified service trade or business (SSTB) | |
| | d. Other tax issues | |
| | e. SALT considerations | |
| II. | Issues in Estate Planning for 2020 | 10:00 – 11:00 am |
| | a. Estate and Gift Tax updates | |
| | b. Protections with Revocable Trusts | |
| | c. “Proactive” Long Term Care Planning | |
| | d. Income Tax Issues in Estate Planning | |

ABOUT THE PRESENTERS:



BOB BRADSHAW, CPA, is a Partner in the tax department of William Vaughan Company. He provides comprehensive tax planning, consulting and compliance services to middle-market clients. As the firm’s manufacturing and distribution industry leader he advises clients on a variety of issues including entity selection, reorganizations, and business succession planning. He also specializes with businesses of all sizes with planning and compliance in connection to state and local requirements and reporting. A graduate of Adrian College, with a B.S. in Accounting, Bob is a member of the American Institute of Certified Public Accountants and the Ohio Society of Certified Public Accountants. He currently serves as Treasurer of Nature’s Nursery in Whitehouse. He lives with his wife and three children in Sylvania, Ohio.

RICHARD CHAMBERLAIN is an attorney with Chamberlain Law Group, Ltd., located in Perrysburg, Ohio. Richard serves clients in the areas of estate planning, asset protection, business planning, and estate administration. He is a member of WealthCounsel, a collaborative group of more than 3,000 estate planning attorneys from around the country, and is also a member of the Ohio Forum of Estate Planning Attorneys. Richard received his undergraduate degree, magna cum laude, from Tulane University, and his J.D. degree, with high honors, from Florida State University College of Law. He and his wife and their family live in Perrysburg, Ohio.



COURSE OBJECTIVES/PURPOSE:

After this course, participants should have a good understanding of the following:

- Common tax issues in estate planning after TCJA
- How the TCJA will impact clients' current estate plan
- Entity structure and other tax implications
- The tax and non-tax benefits to comprehensive estate planning

LEVEL OF INSTRUCTION: Intermediate/Advanced

INSTRUCTOR CRITERIA FOR CLASSROOM:

Instructors are selected, based on these criteria:

- Experience
- Knowledge & expertise on topic
- Teaching experience
- Professional credentials

Our instructors are well respected in the industry, with many years of work experience. Many are published authors who have been requested to appear on radio and television programs because of their expertise and they have presented programs across the country to attorneys, CPAs, CFPs, Trust Officers and financial planning professionals.

PROVIDER:

The Association Office – 7517 Wind River Drive, Sylvania OH 43560 Phone: 419-764-4387

Email: theassocoffice@gmail.com

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