



ROUNDTABLE PROGRAM

PEPC MEMBERS ONLY



In order to promote the increased networking of ideas, the PEPC provides, **for members only**, a series of informal discussions on particular topics of interest to allow all of those attending to participate.

“A NEW PROVISION UNDER THE TAX LAW: QUALIFIED OPPORTUNITY ZONES”

Tuesday, September 25, 2018

12:00 – 1:30 p.m.

**1735 Market Street
5th Floor Conference Center
Philadelphia, PA 19103**

OVERVIEW: The Opportunity Zones program, established via the Tax Cuts and Jobs Act (TCJA), aims to spur long-term private sector investments in low income communities nationwide. Investors in Opportunity Funds established within designated Qualified Opportunity Zones can take advantage of federal tax benefits in exchange for their contributions to economic growth and investment in distressed communities. The amount of federal tax benefit ultimately recognized depends on the holding period of the investment but can include a temporary tax deferral, a step-up in basis and a permanent exclusion from taxable income of gains. Project sponsors can also benefit from lower-cost capital generated by the program. In this session, Baker Tilly will discuss how the Opportunity Zones program works, how to establish a certified Qualified Opportunity Fund, where Opportunity Zones are located, and what’s next for the program. We will also dive into how the program relates to tax and estate planning.

SPEAKER: **Chase India, Partner, Baker Tilly Virchow Krause, LLP**
Chase Inda, partner with Baker Tilly Virchow Krause, LLP, has been with the firm since 2006. He is a member of the firm’s construction and real estate services group. Prior to joining Baker Tilly, Chase worked for a top ten national firm where he specialized in partnership taxation.

COST: No charge! Must be a PEPC Member to attend. **Space is limited!**

NOTE: Bring your own lunch.

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REGISTRATION FORM **SEPTEMBER 25, 2018 - ROUNDTABLE PROGRAM**

Name: _____ Discipline: _____

Company: _____

Phone: _____ Email: _____

Return by Fax: 856-727-9504
Register Online: www.philaepc.org
Questions: 215-486-6215 (*Registrations will not be accepted via phone*)