



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 topics of interest to allow all of those attending to participate.*

“FINANCIAL AND ESTATE PLANNING IN THE CURRENT ENVIRONMENT”

Wednesday, June 24, 2020

12:00 – 1:00 p.m.

Zoom Webinar

OVERVIEW: Our panel of professionals will offer their perspectives on topics including income taxes, estate and trusts, insurance and investments. The panelists will discuss the planning they are doing with their clients and what they’re seeing in the current environment. The program will also include a discussion of potential tax legislation resulting from the upcoming election.

SPEAKERS: **Robert Hart**, Vice President, Bernstein Private Wealth Management
James Hogan, Managing Director, Andersen
Erin McQuiggan, Special Counsel, Duane Morris LLP
Adam Sherman, Founding Partner, 1847 Private Client Group

COST: No charge! Must be a PEPC Member to register.

FORMAT: Zoom Webinar (Log-In Access will be provided to registered participants the day prior to the program)

The Philadelphia Estate Planning Council does not render any legal, accounting or other professional services. The Council's programs and publications are designed solely to help professionals maintain their professional competence. In dealing with specific matters, the individual using any publication obtained through the Council or any information orally conveyed by speakers at programs sponsored by the Council or in materials distributed by the Council should research original sources of authority independently.

REGISTRATION FORM

JUNE 24, 2020 - 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*)