November VIRTUAL LUNCHEON PROGRAM

"Top Tax and Estate Planning Techniques Today (COVID-19, COVFEFE, and the Election)"

Tuesday, November 17, 2020

Zoom Webinar

12:30 – 12:45 p.m. Opening Remarks
12:45 –1:45 p.m. Webinar Presentation

TCJA, COVID-19, and the election have and will change everything we know as planners. This presentation will discuss straightforward and innovative planning opportunities for families (and their businesses) that best take advantage of both the "expiring" and "permanent" provisions of the tax law, with an eye toward anticipated changes to the future planning landscape.

One Education Credit for CLE (PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.

Speaker:
Paul S. Lee is the Chief Tax Strategist of The Northern Trust Company, within the Global Family & Private Investment Offices Group and Wealth Management division of Northern Trust. He is also a Senior Vice President and Managing Director of the company. Prior to joining Northern Trust in 2015, he was a National Managing Director at Bernstein Global Wealth Management, and a partner in the Atlanta-based law firm of Smith, Gambrell & Russell, LLP.

Paul is a Fellow of the American College of Trusts and Estate Counsel, has been inducted into the NAEPC Estate Planning Hall of Fame®, and has been designated an Accredited Estate Planner® (Distinguished). A frequent lecturer and panelist on investment planning, tax and estate planning, Paul has spoken at the Heckerling Institute on Estate Planning, ACTEC National Meeting, Southern Federal Tax Institute, and numerous other institutes and conferences across the country.

Paul received his J.D. and LLM (Taxation) degrees from Emory University School of Law, and B.A. degrees in English and Chemistry from Cornell University.

Zoom Log-In Information
Log-in information will be sent to all registered attendees the day prior to the program.

We have reviewed several video communications services and have chosen Zoom for this event. Unfortunately, not all firms permit the use of Zoom so if you are prevented from using it to attend this event due to company restrictions, please join us using a personal computer or cellular phone or by simply dialing in and listening to the event from a telephone. If you will be using a personal device, please test your connection early; an app or registration may be needed the first time Zoom is used.

November 17, 2020 VIRTUAL LUNCHEON PROGRAM
Registration Form

As a special member benefit during the pandemic, current PEPC members will receive complimentary registration to our November 17th virtual luncheon program. Continuing education credits not included.

Luncheon Program Fee:

PEPC Members	$0	Non-Members	$25

Additional Fees:

CLE Credit (Members)	$15	CLE Credit (Non-Members)	$15
Insurance Credit (Members)	$15	Insurance Credit (Non-Members)	$15
CFP® Credit (Members)	$15	CFP® Credit (Non-Members)	$15

No-shows will be billed. No refunds after November 13, 2020.

ATTENDEE INFORMATION:

Name: ______________________________ Discipline: ______________________

Company: ____

Address: ____

City, State, Zip: ______________________________________

Phone: ______________________ Email: __________________________

CONTINUING EDUCATION INFORMATION:

(Fee: $15 per Credit)

☐ Continuing Legal Education (1 credit)…………………Attorney ID: ______________________

☐ Insurance Continuing Education (1 credit)…………License Number: ____________________

☐ CFP® Continuing Education (1 credit)………………Last 4 Digits of SSN: _________________

CTFA, PACE and CPA Certificates will be emailed to attendees after the webinar at no additional charge.

PAYMENT INFORMATION:

☐ Check Payment (Payable to PEPC)

☐ Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at www.philaepc.org. **Members must be logged into the site to receive the discounted member pricing.**

Return by Mail: Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

Return by Fax: 856-727-9504 **Register Online:** www.philaepc.org

Questions: 215-486-6215
(Registrations will not be accepted via phone)