



SEPTEMBER VIRTUAL LUNCHEON PROGRAM

“CHARITABLE TAX PLANNING IN THE TIME OF COVID-19”

TUESDAY, SEPTEMBER 15, 2020

ZOOM WEBINAR

12:30 – 12:45 P.M. OPENING REMARKS

12:45 – 1:45 P.M. WEBINAR PRESENTATION

Recent tax reform complicates strategies for tax-efficient charitable contributions. Using actual client experiences, this presentation explores practical solutions and innovative ways to help donors evaluate their options and make good decisions about tax-effective giving. During the program, you'll get an in-depth look at charitable IRA rollovers, legacy IRAs, lifetime CRATs, charitable gifts from trusts and estates, private foundation investment tax, donor advised fund distribution requirements, program related and SRI investments, and “charitable LLCs.”

Learning Objectives:

1. Understand giving trends and innovations set in motion by the CARES Act, SECURE Act, and Tax Cuts and Jobs Act.
2. Help donors align their own wealth planning needs and philanthropic desires with new giving strategies and opportunities.
3. Motivate donors to take action when they need to change their approach to giving.

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

Speaker:

As a national wealth strategist at BNY Mellon, Justin T. Miller, J.D., LL.M., TEP, AEP®, CFP® works collaboratively with other advisors to provide comprehensive wealth planning advice to clients and their families. He also is an adjunct professor at Golden Gate University School of Law, a Fellow of The American College of Trust and Estate Counsel, and a sought-after speaker on tax, estate planning and family governance topics for leading conferences throughout the country. In addition, Justin has published numerous articles, and he is frequently quoted as an industry expert in the media. He received a master of laws in taxation and a juris doctor from NYU School of Law and a bachelor's degree, with honors, from U.C. Berkeley.

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.

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