



MARCH EDUCATIONAL PROGRAM

"POST MORTEM TAX PLANNING - ELECTIONS FOR INCOME, TRUST, GIFT AND ESTATE TAX RETURNS"

TUESDAY, MARCH 19, 2024

THE UNION LEAGUE
140 SOUTH BROAD STREET
PHILADELPHIA, PA 19102

AFTERNOON PROGRAM FORMAT:

3:30 – 4:00 P.M. REGISTRATION

4:00 – 5:00 P.M. PROGRAM

5:00 – 7:00 P.M. COCKTAIL RECEPTION

This presentation will discuss protecting the fiduciary, estate's fiscal year election, administration expense election, alternate valuation election, Section 643(e) election, portability, QTIP election, qualified domestic trusts, disclaimers, death of a partner, S corporation stock, Section 645 election, Section 6166 deferral of estate tax and generation skipping tax elections.

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

Speaker:

Jere Doyle is an estate planning strategist for BNY Mellon Wealth Management and a senior vice president of BNY Mellon. He has been with the firm since 1981. Jere provides wealthy individuals and families throughout the country with integrated wealth management advice on how to hold, manage, and transfer their wealth in a tax efficient manner.

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.

MARCH 19, 2024 EDUCATIONAL PROGRAM REGISTRATION FORM

Luncheon Program Fee:

PEPC Members: \$60

Non-Members:

\$80

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

\$5 additional charge for walk-in registrations at the door without pre-registration.

No-shows will be billed. No refunds after March 15, 2023

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

Registration Fee: ☐ PEPC Member (\$60 per person) ☐ Non-Member (\$80 per person)

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 Credits available onsite at the meeting 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*)