

Tax Reform and the High-Net-Worth Individual

February 20, 2018

Course Description:

Mark Baran and Russell Ephraim from Marks Paneth LLP, will present a webinar on “Tax Reform and the High-Net-Worth Individual.” The online session will cover the provisions in the Tax Cuts and Jobs Act (H.R. 1) that most affect high-net-worth individuals’ personal income tax, domestic and foreign investments or businesses, and estate and wealth transfer planning.

Learning Objectives:

Participants will receive an overview of the following tax law changes as they relate to high-net-worth individuals:

- Changes to individual taxation and deductions
- New rules affecting investments, business interests and wealth holding structures
- Provisions impacting wealth transfer and charitable planning
- New international tax provisions
- How to effectively model and project the impact of TCJA
- Immediate actions that can be taken to comply with TCJA
- How to identify and plan for areas of uncertainty

Program Level: Intermediate

Who Should Attend: High-net-worth individuals; Professionals who serve the legal, banking, wealth management, and other financial needs of high-net-worth individuals

Delivery Method: Group-Live, Group Internet Based

Prerequisites: None

Advanced Preparation: None

CPE Credits: Taxes 1

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