Subject: May (Virtual) Estate Planning Council of Hampden County Meeting May 4, 2021
From: "Joan Peterson, Administrator" <estateplan_hc@dejazzd.com>
Date: 4/20/2021, 2:27 PM
To: undisclosed-recipients: ;

THE ESTATE PLANNING COUNCIL OF HAMPDEN COUNTY, INC.

MAY (Virtual) MEETING

Date: May 4, 2021
Time: 10:30 a.m. - 12:30 p.m.
Subject: Hot Topics in Estate Planning: A Morning with Robert S. Keebler

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WESTERN NEW ENGLAND UNIVERSITY | WNE

Hot Topics in Estate Planning: A Morning with Robert S. Keebler

Please join Western New England University and the Estate Planning Council of Hampden County on Tuesday, May 4 as we welcome Robert S. Keebler as he presents two engaging courses in Estate Planning:

Income Tax and Estate Tax Changes Under a Biden Administration for Estate Planners

Estate Planning is likely to change dramatically in the coming months. Although we cannot know what will ultimately be enacted, there is much to consider. This course will focus on the likely and consequential tax proposals; including how to help clients prepare now.

Wealth Planning for Large IRAs, Including Roth Conversions, CRTs and Life Insurance

Planning for large IRAs is complex and involves property law, income tax and the estate tax – in addition to the practical finance issues. This course will focus on core concepts and IRA estate planning methods to increase wealth transfer.

Event Details

Hot Topics in Estate Planning: A Morning with Robert S. Keebler
For Legal, Accounting, and Financial Service Professionals

Tuesday, May 4, 2021
10:00 a.m. to 12:30 p.m.
Virtual (Zoom Webinar)

This program is designed to qualify for two CLE and CPE credits.

Advance registration is required by Monday, May 3.

COST
$75 General Admission

$50 Estate Planning Council of Hampden County Members
$50 Current WNE Law Students

You will be registering directly with Western New England University. Click Below.

Register Today

Identify yourself as an EPC member to get special pricing.

Robert S. Keebler, CPA/PFS, MST, AEP (Distinguished) is a partner with Keebler & Associates, LLP and is a 2007 recipient of the prestigious Accredited Estate Planners (Distinguished) award from the National Association of Estate Planners & Councils. He has been named by CPA Magazine as one of the Top 100 Most Influential Practitioners in the United States and one of the Top 40 Tax Advisors to Know During a Recession. His practice includes family wealth transfer and preservation planning, charitable giving, retirement distribution planning, and estate administration.

Questions? Contact Elizabeth Simpson, JD, LLM at (413) 796-2108 or elizabeth.simpson@wne.edu.

Western New England University | 1215 Wilbraham Road | Springfield, MA 01119

Attachments:

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