

U.S. Income and Estate Tax: Where We Were, Where We Are, Where We Are Going and How We're Getting There

In this session you'll learn:

In-depth review of the major provisions of current tax reform legislation: tax rate on businesses, individual tax rates, PEP limitation, PEASE Limitation, Territorial tax, executive compensation, family offices and investment vehicles. Assessment of the impact on nonprofits by changes to charitable deductions, substantiation for charitable deductions, estate and gift taxes, and private foundation and donor advised fund rules.

Meet the presenter:

Edward J. Mooney, JD – Managing Director, BNY Mellon Wealth Management.

Ed Mooney is a senior family wealth strategist for BNY Mellon Wealth Management. He has advised clients on all aspects of family wealth and business succession strategies, concentrated equity solutions, retirement and cash flow planning, income tax control, estate & gift tax reduction techniques and investment asset allocation.

Ed is an attorney with experience in Tax, Estates, Pensions and Securities. He joined the company in 1987 and has more than 30 years' experience in financial services, banking and investments.



Breakfast
Seminar
May 10, 2018
8:00 AM – 9:00 AM
7:30 AM registration

Powelton Club
29 Balmville Rd.
Newburgh, NY
No Jeans Please

Breakfast included
FREE to HVEPC
Members
\$25 Non-Members

*CPE Credits
Pending

To Register Visit:
<http://bit.ly/TLSeminar>

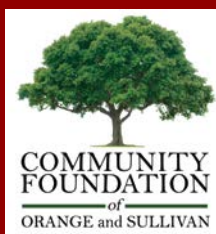
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