

Presents

Transitional Estate Planning

What to do When the Estate Starts to Exceed \$11.4M



Friday, June 14, 2019

40 Pacifica, 15th Floor
Irvine, CA

11:30 am - 1:30 pm

11:30 am *Networking and Lunch*

Earn 1.5 hours of CPE & CFP credit

Bring a client to share the experience!

We help you identify thoughtful and innovative strategies to increase personal wealth, prepare heirs, and preserve a family wealth legacy for generations, all while reducing or eliminating exposure to taxes, creditors, predators, and abusive or divorcing spouses.

- Reduce your income, gift, and estate taxes
- Transfer wealth tax-free while retaining control
- New opportunities for transfer tax planning using the increased estate, gift, and GST tax exemptions and new opportunities for planning
- How to build flexibility into plans
- Practical guidance on tax planning strategies under the new law
- Sell capital assets on a tax-exempt or tax-deferred basis
- Protect family wealth from creditors, predators, and divorce
- Ensure your family wealth legacy is preserved for trained heirs

*To attend this informative presentation, please **RSVP to (949) 453-2900***



THE ORANGE COUNTY
REGISTER

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