

2021 Estate & Trust Conference

Webcast

Friday, June 11, 2021

PROGRAM

7:30 – 8:00 a.m.	<i>Registration Opens</i>
8:00 – 8:05 a.m.	<i>Welcome & Opening Remarks</i>
8:05 – 9:20 a.m.	Critical Trust and Estate Planning Issues in 2021 Steven Siegel, LLM (Taxation), JD The Siegel Group, Morristown, NJ
9:20 – 9:35 a.m.	<i>Break</i>
9:35 – 10:50 a.m.	Legislative Estate and Gift Tax Updates - Federal and State Christopher Cline, JD Riverview Trust Company, Vancouver, WA Michele Wasson, JD Riverview Trust Company, Vancouver, WA
10:50 – 11:50 a.m.	Pre- and Post-Death Planning for IRA & Retirement Plan Benefits Post-SECURE Act Jeffrey Moore, Attorney Saalfeld Griggs PC, Salem, OR
11:50 a.m. – 12:50 p.m.	<i>Lunch</i>
12:50 – 2:05 p.m.	Domicile Planning: What Must Be Done to Change One's Domicile Steven Siegel, LLM (Taxation), JD The Siegel Group, Morristown, NJ
2:05 – 3:05 p.m.	Oregon & Washington Estate Taxes Philip Jones, Attorney Duffy Kekel LLP, Portland, OR
3:05 – 3:20 p.m.	<i>Break</i>
3:20 – 4:35 p.m.	Assisting the Survivors: A CPA's Role in the Decedent's Estate Ed Zollars, CPA Thomas Zollars & Lynch Ltd, Phoenix, AZ
4:35 p.m.	<i>Closing Remarks & Conference Adjourns</i>