



DON'T TAX YOURSELF

A Publication of Bowditch & Dewey's Estate, Financial & Tax Planning Group

Trust & Estate Planning in a Unique Year (Webinar)

BY REBECCA MACGREGOR • OCTOBER 8, 2020

Rebecca MacGregor will be speaking at the webinar “Trust & Estate Planning in a Unique Year” hosted by Massachusetts Lawyers Weekly.

We haven't experienced a year quite like 2020 before, but we have learned how to adapt and plan for uncertainty. With the upcoming presidential election, it is expected there could be changes to federal tax laws that will be enacted in 2021. Before this happens, there are some estate planning tools that you should consider.

Some topics panelists will discuss include:

- How should you alter estate planning strategies given the current situation? Are there specific elements of your plan that should be reviewed?
- How does the SECURE Act and CARES Act, including withdrawals and loans from retirement accounts, affect retirement planning?
- What should be addressed when multiple generations are living together during a pandemic?
- How should you approach federal estate, gift, and generation-skipping transfer (“GST”) tax exemptions?

OCTOBER 14, 2020

10:00AM

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