



Wealth Transfer Planning with Qualified Opportunity Zone Fund Interests

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Earlier this year, the IRS issued a second tranche of regulations on Qualified Opportunity Zones (QOZ). The new regulations also address the wealth transfer planning tax implications associated with gifts and transfers at death of QOZ Fund Interests. The new rules create traps for the unwary, but also, important planning opportunities.

This webinar, presented by Jenny Connors and Farhad Aghdami, partners in the William Mullen Tax Practice, covered the wealth transfer tax planning considerations associated with QOZ Fund Interests.

For slides from the webinar and to learn more about how you can maximize the wealth transfer tax planning opportunities associated with QOZ Fund Interests, click below.



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