



Virtual Tax Forum: Tax and Wealth Planning Updates

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COVID-19 has not only had serious implications on our daily lives, but it has also significantly impacted businesses and individuals from a tax planning perspective. As the pandemic continues to evolve, it is important to consider what planning opportunities can be implemented to mitigate losses as well as favorable strategies for wealth planning. Join partners **Farhad Aghdami** and **Anna Derewenda** for our first virtual tax forum where they will cover recent updates in tax and wealth planning, including:

- Estate planning considerations for the second half of the year, including planning with lower interest rates, potential changes in tax laws, planning with retirement plan benefits, and a review of select recent developments, including a discussion of the Nelson case involving defined value transfer clauses.
- Loss planning for individuals and corporations, including use of losses, access to suspended losses, loss limitations, and refunds.

Contact:

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Disclaimer:

This webinar is for information purposes only and does not constitute legal advice nor automatically form an attorney-client relationship with participants.

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Related People

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