2019 Essex County Estate Planning Council Annual Meeting

THIS EVENT HAS ENDED FOR 2019.

Please join us on Tuesday, October 29 for the Essex County Estate Planning Council's Annual Meeting at Crestmont Country Club in West Orange, NJ. Stuart Gladstone, Esq. of Brach Eichler LLC, and this year's featured speaker, Jonathan G. Blattmachr, Esq., Director of Estate Planning at Peak Trust Company; Director at Pioneer Wealth Partners; and Editor-in-Chief of Wealth Transfer Planning, will discuss The Kaestner Case and State Income Taxation.

Topics included:

- A deep dive into the Supreme Court's Kaestner decision
- The importance of the case and its implications for state taxation
- How non-grantor trusts can avoid state income taxes even if the settlor and beneficiaries are state residents
- Specific trust structures for "removing" a trust from a state to avoid state income tax
- What to do if the trustee's "presence" is the triggering event for state income taxation

New Jersey CPE, CFP, CLE, and CLU credits available.

DATE: Tuesday, October 29, 2019

TIME: 12:00 p.m. – 2:00 p.m. *Lunch will be served*

LOCATION: Crestmont Country Club – 2 Laurel Avenue, West Orange, NJ 07052
Valet parking available. Please, no tipping.

REGISTRATION: Please contact Allison Katz at 973-403-3156 or akatz@bracheichler.com by October 18.