

## 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](mailto:akatz@bracheichler.com) by October 18.