Events
November 03, 2021
Wealth Transfer Strategies: Changes and Opportunities

With a push by the Biden Administration to return federal estate taxes to their historic norms, clients are laser-focused on their estate plans and are turning to their advisors for guidance. To what extent will Congress enact changes to gift, estate, and income tax laws? Regardless of if or when this happens, the tax proposals endorsed by the Biden Administration have caused many clients to reevaluate their plans. In this session, we will receive an update on where things stand now, what they may look like in 2022, and what opportunities exist for advisors to connect with clients in a meaningful way through wealth transfer strategies.

Authors

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