

Join us for

ESTATE PLANNING & TAX SEMINAR

QUALIFIED FAMILY-OWNED BUSINESS INTERESTS
POST-MORTEM ESTATE PLANNING

1.0 CPE CREDIT

Provided by Approved Program Sponsor
State Board of Accountancy & State Architects Licensure Board
Bureau of Professional and Occupational Affairs

QUALIFIED FAMILY-OWNED BUSINESS INTERESTS

House Bill 465 was signed into law in 2013, making numerous changes to tax laws in Pennsylvania, including changes to inheritance tax. Specifically, modifications to the Tax Reform Code that indicate the transfer of qualified family-owned business interests are not subject to Pennsylvania inheritance tax. Learn about this new tax law including the requirements for qualified family-owned business interests and qualified transferees as well as post transfer requirements and planning opportunities.

POST-MORTEM ESTATE PLANNING

There are many nuances to post-mortem estate planning which could have major consequences for your clients. Learn more about the decisions you and your clients will need to make during this process including selection of a fiscal year, deductions, IRA planning considerations, disclaimers, implications of US Series E Bonds, and more.

THURSDAY, MAY 22, 2014

OFFICES OF GROSS MCGINLEY, LLP
33 S. Seventh Street
Allentown, PA 18101
FREE PARKING

7:45 a.m. Registration | 8:00 a.m. to 9:00 a.m. Program

Presented by

ATTORNEYS DONALD LABARRE, JR., ROBERT A. ALPERT, & KIMBERLY SPOTTS-KIMMEL

We are offering this seminar free of charge. However, space is limited.

Please complete and return the attached Registration Form by **Thursday, May 15th** to Maddy Miller by fax to (610) 820-6006 or by email to mmiller@grossmcginley.com.

For more information, please call (610) 820-5450.





Registration Form

ESTATE PLANNING & TAX SEMINAR

QUALIFIED FAMILY-OWNED BUSINESS INTERESTS
POST-MORTEM ESTATE PLANNING

NAME: _____

TITLE: _____

COMPANY: _____

ADDRESS: _____

PHONE: _____

EMAIL: _____

Please add my email address to your mailing list
for future seminars and legal updates.

Please fax/email/mail before **Thursday, May 15th**, to:
Maddy Miller, Business Development & Marketing Manager
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