

Speaking Engagements | December 2, 2020 | 10:00 AM - 12:00 PM ET

## Annual Year-End Tax Forum

### SPEAKERS

Saba Ashraf | Joel M. Post | Joan C. Arnold | Bruce K. Fenton | Howard S. Goldberg | Morgan Klinzing | Justin H. Brown

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### Wednesday, December 2 • 3:00 – 5:00 p.m. ET

2020 has been a year of uncertainty. As the year finally draws to a close, we look ahead with hope for prosperity in the coming year.

To help in your planning, you're invited to an in-depth look at how current tax developments and new provisions impact your tax planning for 2021 and beyond.

The virtual panel discussion will be comprehensive for both individuals and businesses and will include information about new tax law provisions and revisions. It will also include the tax implication of the results of the election.

Register to join us for a well-rounded discussion with tax professionals from Marcum LLP and Troutman Pepper.

#### Individual Tax

- CARES Act implications
- Deferral of employee share of Social Security
- Qualified Opportunity Zone Relief
- ACA Protective Claims for potential elimination of taxes
- SECURE Act retirement planning

### SPEAKERS

- Justin Brown, Partner, Troutman Pepper
- Michael D'Addio, Principal, Marcum
- Carolyn Mazzenga, Partner, Marcum

#### Business Tax

- Opportunities for tax refunds created by the CARES Act
- Income tax implications of PPP loan forgiveness
- Disaster losses due to COVID-19
- Status of existing and potential for additional COVID-19 relief
- Entity planning opportunities in a depressed environment
- Cancellation of debt income

- Outlook for 2021 based on the outcome of the presidential election

## SPEAKERS

- Saba Ashraf, Partner, Troutman Pepper
- Andrew Finkle, Partner, Marcum
- Howard Goldberg, Partner, Troutman Pepper
- Juliet Song, Partner, Marcum

## Trusts & Estates

- Legislative changes to expect as a result of the Nov. 3 election
- Year-end considerations, including annual exclusion gifts and gift tax exemptions
- Planning strategies, including SLATs (Spousal Access Lifetime Trust), intentionally defective grantor trusts, GRATs (Grantor Retained Annuity Trusts), and refinancing existing promissory notes

## SPEAKERS

- Justin H. Brown, Partner, Troutman Pepper
- Janis Cowhey, Partner, Marcum
- Ron Finkelstein, Trusts & Estates Practice Co-Leader, Marcum

## International Tax

- Taking your business offshore: What you need to know
- Changing priorities – “U.S. “Non-Territorial” tax system
- GILTI – The Global Intangible Low Taxed Income Tax
- GILTI high-tax exception
- Section 962 election
- Anticipated post-election changes for U.S. multinationals

## SPEAKERS

- Kristina Albarella, Director, Marcum
- Joan Arnold, Leader, Tax and Benefits Practice, Troutman Pepper
- Morgan Klinzing, Associate, Troutman Pepper
- Douglas Nakajima, International Tax Co-Leader, Marcum

## State and Local Tax

- COVID-19 Implications to individuals and businesses
- Sales tax update
- Other state tax updates and changes from across the country

## SPEAKERS

- John Bonk, National State & Local Tax Leader, Marcum
- Mary Jo Dolson, Partner, Marcum
- Rod Gagné, Partner, Troutman Pepper
- Joel Post, Associate, Troutman Pepper

## MODERATORS

This will be a roundtable discussion with a spirited conversation led by our two moderators:

- Bruce K. Fenton, Leader, Private Equity Practice, Troutman Pepper
- Ed Reitmeyer, Mid-Atlantic Tax Leader, Marcum

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