

Before the Bell Breakfast Forum: Pulling Out the Crystal Ball for 2013 and Beyond for Estate and Gift Taxes

November 15, 2012

Townsend Hotel (Birmingham)

Even though the election will be over, the uncertainty prevails. Discussions at "Pulling Out the Crystal Ball for 2013 and Beyond for Estate and Gift Taxes" will include:

- whether we take advantage of the \$5 Million Dollar gift exclusion now
- the likely estate tax landscape in the future
- the benefits and use of the portability provisions
- the proposals to:
 - lengthen the term of GRATs
 - effectively eliminate the utilization of IDGTs
 - limit the amount of discounts on transferred properties
 - limit the duration of dynasty trusts

Time:

7:15 AM - 8:30 AM

Location:

The Townsend Hotel
Birmingham, MI

Cost:

There is no cost to attend; space is limited to registered representatives, investment advisors and trust officers; advance reservations required.

Questions:

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