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## January Event

### PLANNING IN THE BIDEN ERA

THURSDAY, JANUARY 14, 2021

3:00-4:30 PM

Zoom presentation by Ben Dailey, Marcum and Jim Cardosi, WIPFLI

Please join industry experts, Ben Dailey and Jim Cardosi, for a discussion on tax savvy tips for us to consider for the upcoming Biden era. Topics will include: Reduction of the estate tax exemption and potential loss of basis step-up; individual income considerations specific to TCIA/CARES/Biden proposals; highlights of the 4<sup>th</sup> stimulus package and tax implications it carries; change to Maine residency for clients that stayed in Maine longer due to COVID; and much more.

#### About the Speakers:

Benjamin Dailey is a tax partner at Marcum's Portland, Maine office. Mr. Dailey specializes in providing federal and state taxation, consulting services to individuals, and closely held entities. He has more than 19 years of experience in public accounting, and has an extensive portfolio providing clients with tax planning and business succession strategies.

Jim Cardosi is a tax senior manager in Wipfli's South Portland office and provides comprehensive tax services, with a focus on self-employed individuals and small businesses. He values being a trusted advisor and providing planning, research, and consultative services, in addition to accurate, timely tax compliance. Prior to a career in public accounting, Jim served as an aviator in the United States Navy.

**ZOOM MEETING DETAILS WILL BE PROVIDED TO REGISTRANTS ON WEDNESDAY, January 13.**