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September Event

Zoom presentation by Kelly Pelletier & Griffin Leschefske

**Thursday, September 16, 2021
3:00 – 4:30 PM**

Topic: Advanced Gifting in 2021 and Beyond

Please join industry experts, Kelly Pelletier and Griffin Leschefske, as they discuss advanced gifting options for high-net-worth clients to consider in light of the current gift, estate, generation-skipping and income tax environment in which we live. Kelly and Griff will walk through a set of hypothetical examples, illustrating the multitude of strategies available. They will also examine how important considerations like age, control, family structure and type of assets held factor into the analysis for which gifting strategy may ultimately prove most successful.

About the Speakers:

Kelly Pelletier, JD, CPA

Kelly is a senior manager in the tax practice at Baker Newman Noyes. She focuses her practice on high-net-worth individuals, specializing in income tax planning and compliance for individuals, trusts and estates. She is also one of BNN's experts in complex estate and gift tax planning and compliance. Kelly has been a member of the Maine Estate Planning Council since 2015, and served on the board from 2018-2021.

Griffin Leschefske, Esq.

Griff is an associate at Pierce Atwood LLP, where he represents clients on all aspects of trust and estate planning and administration. Griff frequently advises on advanced tax planning strategy. He is a member of the Maine Estate Planning Council and a member of the Maine Estate Planning Council Board of Directors.

**ZOOM MEETING DETAILS WILL BE PROVIDED TO
REGISTRANTS ON WEDNESDAY SEPTEMBER 15TH**