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MAINE ESTATE PLANNING COUNCIL

Meeting Notice

Date: Thursday, October 19, 2017

Location: Portland Country Club

Time: Breakfast at 7:30AM; Presentation at 8AM

The Charitable Remainder Trust vs Section 1031 Exchange

With investment real estate selling once again at a profit, sellers are looking for ways to avoid or defer the capital gain taxes. This session will look at the pros and cons of using 2 very different strategies: the Charitable Remainder Trust versus the Section 1031 tax-deferred exchange. We will look at how we counsel clients and when we recommend one over the other, with case studies.

Our Speakers

Jim Hopkinson lives in Brunswick with his wife, Susan, and stepdaughter, Samantha. He enjoys flying, golfing and traveling. Jim has his pilot's license and owns an aircraft. Besides using his plane for business travel and personal enjoyment, Jim is proud to be a volunteer pilot with Angel Flight of New England, an organization that provides medical assistance and free air transportation on private aircraft to people in need.

Richard J. Abbondanza is a partner in the Portland law firm of Hopkinson & Abbondanza. He received his undergraduate degree from Amherst College, cum laude, and his law degree from Catholic University of America. Mr. Abbondanza regularly speaks on the subjects of estate planning, retirement planning and real estate and business succession planning. He is admitted to practice in all Maine courts. He is a member of the Maine Estate Planning Council, WealthCounsel, a national association of estate planning attorneys and advisors, and a graduate of the two-year Laureate Program of the Southern California Institute. He currently is serving on the Boards of North Yarmouth Academy and Lift360 (the successor to the Institution for Civic Leadership). He has served as an Adjunct Lecturer for Merrimack College's CFP estate planning review course and also on the Board of Big Brothers Big Sisters of Southern Maine and Woodfords Family Services.

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Free for Members; \$50 for non-members