MAINE ESTATE PLANNING COUNCIL

Meeting Notice

Date: September 19, 2019
Location: Portland Country Club
Time: 4:30 – 6:00 P.M.

Topic: The Tax Cuts and Jobs Act ("TCJA"): Observations and Practical Implications. This panel discussion, led by local Tax Practitioners and a Tax Attorney, will highlight key provisions of the TCJA – including the law's impact on individuals, trusts and estates, and businesses. This is a timely topic as we approach the second Tax Season with the legislation.

Speakers:

Nelson Toner, Esq. Nelson is a Shareholder at Bernstein Shur in Portland, Maine and is the Chair of the firm's Tax Practice Group. Nelson works with clients to navigate the tax consequences of even the most complex transactions, including mergers and acquisitions, tax-free exchanges, reorganizations, and municipal and private activity bond financing. In addition, Nelson advises educational organizations, health care agencies, hospitals and non-profits on a range of tax matters. Nelson serves on the board of Portland Stage Company and on various committees at Woodfords Church and Northern Light Health (Mercy).

Kelly A. Busby, JD, CPA. Kelly is an attorney and CPA at Honeck O'Toole in Portland, Maine. Kelly focuses on the income taxation of trusts and estates, business planning, individual income taxes and estate and gift tax planning. Kelly is a graduate of the University of Maine Law School and the University of Southern Maine, School of Business. Kelly serves as the Treasurer of the Maine Estate Planning Council.

Benjamin Dailey, CPA. Ben is a Partner at Marcum LLP in Portland, Maine. Ben focuses on business income taxation, as well as individual income taxation. Ben attended the University of Maine and received a degree in Business Administration with a concentration in Accounting. He has practiced public accounting since 2000 and is a member of the American Institute of Certified Public Accountants, Maine Society of Certified Public Accountants and Massachusetts Society of Certified Public Accountants. He was a member of the Maine Air National Guard for six years, and has volunteered with the Big Brothers Big Sisters of Southern Maine and the United Way of York County.

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Free for Members; $50 for non-members