

CTPost

Julie Jason: A can't-miss presentation on taxes

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A Stamford opportunity like no other

Every now and then, an occasion to learn presents itself that is like no other. Such an opportunity is coming to Stamford, my home territory, in a few weeks and I invite you wholeheartedly to take advantage.

On the evening of Thursday, April 26, three renowned high net worth experts serving investors, fiduciaries, philanthropists, collectors, business owners and estates, will be presenting on a subject that one cannot avoid, dismiss, or discount: taxes.

Due to tax law changes, 2018 presents a different environment than 2017 — but how different? Estate taxes have changed dramatically on both the federal level and for residents of the state of Connecticut. However, some discussed changes did not materialize (for example, one proposal was to eliminate a step-up in cost basis; that did not happen).

What about income taxes? Some changes are brand new (for example, if you get divorced now, alimony will no longer be tax deductible). In some cases, old rules are unchanged (for example, capital gains tax rates on sales of appreciated property remain the same). And in other cases, we have a combination of new and old: for example, charitable deductions are still permitted, however, fewer taxpayers will benefit. Likewise, alternative minimum taxes (AMT) are still in place, but fewer taxpayers are affected. Of course, what I just mentioned only touches the surface. The assembled expert panel, which I'll tell you about in a moment, will go deeper, leaving you with an understanding of what you need to know to plan the rest of the year and what to discuss with your tax adviser (by the way, invite your tax adviser to attend with you).

So here is the team:

[Excerpt]

Our income tax expert is CPA John Mezzanotte, a graduate of University of Connecticut (BS in Accounting; MBA in Finance). John is the managing partner of Marcum's office in Greenwich, Connecticut. Marcum LLP is one of the largest independent public accounting firms.

I've heard John present and without a doubt, he is the best tax-storyteller I've encountered. (Yes, it's a rare talent, but I can assure you that John will both entertain and enlighten, even when talking taxes.)

John has the experience (30 years) and the insights to address high net worth issues, which tend to be more complex, such as those experienced by hedge fund and private equity firms, family offices, and owners of closely held and start-up companies — and he will address the special needs of high net worth investors, collectors and philanthropists...

Julie Jason, JD, LLM, a personal money manager (Jackson, Grant of Stamford, CT) and award-winning author, welcomes your questions and comments (readers@juliejason.com). To hear Julie present, visit www.juliejason.com/events. Julie has penned more than 1,000 weekly columns for the Greenwich Time and Stamford Advocate; her most recent book, "Retire Securely: Insights on Money Management from an Award-Winning Financial Columnist," a curated collection of columns, is now available on amazon.com.