



Hoosier Hills Estate Planning Council

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Hoosier Hills Estate Planning Council • c/o Jessica Hidalgo • 812-405-1734 • 813 West 2nd Street. • Seymour, In 47274

February 24, 2022 Seminar

Tax & Estate Planning in a Changing Tax Landscape

Synopsis:

Proposed legislative changes and the sunset provisions of the Tax Cuts and Jobs Act have made it crucial to have a solid estate plan for multiple possible tax scenarios. Join us for a look at the tax rules as they exist today for decedents and their estates and the changes that have been proposed for the future. Gain insight into planning strategies that can be utilized now to create a favorable tax situation regardless of what the future holds for estate taxation.

Course Content:

1. Tax rules today for individuals, decedents, and estates
2. 2025 – Sunset under the TCJA
3. Various Federal tax legislative proposals
4. Planning points – What we can do now?

Difficulty: Intermediate

Biographies

Gregory D. Sigman, CPA, Tax Director

Greg is a Tax Director at L.M. Henderson and Company, LLP. Greg has more than 35 years of public accounting experience, of which the past 20 years have been spent with LM Henderson & Company. Over this time frame he has had experience with individual, business, and trust and estate taxation and planning. He is designated as a Certified Specialist in Estate Planning. Greg is currently a member of the Indiana CPA Society and the American Institute of Certified Public Accountants.

Jude Thompson, CPA, Partner

Jude is a Partner at L.M. Henderson and Company, LLP. He has over 20 years of experience in public accounting, providing tax compliance/planning and accounting services to a wide range of individual, business, and not-for-profit clients. Sales tax, personal property tax, multistate income tax, corporate stock options, and implementation of computerized accounting systems are other areas of expertise. Jude is currently a member of the Indiana CPA Society and serves as a Trustee for the Society's political action committee. He is also a member of the American Institute of Certified Public Accountants.

Chris Hunt, CPA J.D., Tax Manager

Chris is a Tax Manager at L.M. Henderson and Company, LLP. Chris has over 8 years of experience in the tax profession as a lawyer and public accountant. He specializes in business and individual income tax planning, but also has broad experience covering estates and trusts, state and local taxation, and nonprofit taxation. Chris is currently a member of the Indiana CPA Society and the Indiana State Bar Association.