

CLIENT EDUCATION EVENT

**MONEY
MATTERS**

with **KEN MORAIF**

Your Path to Financial Peace of Mind

If it's important to you, then it's important to us! As a retirement specialist, we want to discuss topics that are relevant and important to you! Whether you are retired or retiring soon, our client education events are designed to arm you with the information for your path to financial peace of mind!

Topic:

THE FUTURE DIRECTION OF ESTATE PLANNING.

Recently estate planning has changed under the tax bill known informally as the Tax Cuts and Jobs Act (the "Act"), which was signed into law on December 22, 2017. With this change the Act doubles the estate tax exemptions to \$11.2 Million per taxpayer and offers us an unexpected "window of opportunity" to shift significant wealth off the balance sheet tax free. The Act is the biggest tax overhaul in more than 30 years!

IN THIS INFORMATIVE SEMINAR, WE WILL

- Explore document updates
- Plan revisions
- Discuss post mortem planning
- Learn how to navigate the recent changes to the tax law

The speaker is **Sol S. Reifer, J.D., LL.M.**, Director in the Dallas office of Coats Rose P.C., with over 30 years' experience in trusts and estate planning law. He counsels clients on estate planning, with a philosophy that estate planning is a process of planning for the accumulation, conservation and distribution of wealth between the generations.

SEATING IS LIMITED, and it will be distributed on a first-come, first-served basis.

PLEASE NOTE: Identical information will be presented and discussed at both dates and locations.

HOUSTON

Monday, August 27th, 2018

7:00 PM - 9:00 PM

Crowne Plaza Houston Galleria

7611 Katy Freeway

Houston, TX 77024

Office Phone: **713.255.1007**

THE WOODLANDS

Tuesday, August 28th, 2018

7:00 PM - 9:00 PM

Hyatt Place

1909 Research Forest Dr.

The Woodlands TX 77380

Office Phone: **832.791.2300**

BRING A FRIEND

We would be happy to meet your guest, chat about what we do and answer any questions they may have.

We will have our now world famous oatmeal raisin and chocolate chunk cookies waiting for you!



Email: events@moneyatters.net | 800.994.0302 | www.MoneyMatters.net

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