

Understanding Estate Planning and Tax Considerations for Lesbian and Gay Couples

Join us for this FREE discussion.

October 19th • 5:30pm– 7:00pm

Q Center – 4115 N Mississippi Ave. Portland, OR 97217

Be more informed on:

- The impact of being an Oregon Register Domestic Partner (RDP)
- The tax impact of shared items, such as joint investments, homeownership and itemized deductions
- Potential for shifting income to maximize tax savings.
- Estate Planning Overview for Same-Sex Couples
- Protections for you and your partner through proper estate planning
- Asset Protection Options for your Surviving Partner
- Advantages of IRA Beneficiary Trusts

Benefits of incorporating a Trusteed IRA into your overall estate plan

- Protects you and your partners IRA assets;
- Creates a legacy for the next generation;
- Provides a plan in the event of incapacity; and
- Helps to achieve philanthropic/charitable goals.

HOSTED BY:

MARK CLIFT | CPA | McDonald Jacobs PC

JIM McVITTIE | Attorney at Law | McVittie-Law PC

CLINT EDDY | Trust and Estate Specialist | Merrill Lynch Wealth Management

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For more information or to RSVP call David Quisenberry at 503 221 4620 or email: david.quisenberry@ml.com

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