

Baker Tilly Estate and Trust Conference 2018

Date & Time

Start Date: 06/01/2018

Helene Jaron, vice chair of Cozen O'Connor's **Private Client Services Practice**, participated in the Baker Tilly Estate and Trust Conference. Helene led two presentations titled, "**Leaving Business Assets to Charities**" and "**Tax Update - The Lender Bagel Case**." The first presentation focused on charitable planning with closely-held business interests, and the second presentation analyzed the impact of the recent Tax Court decision in the Lender Bagel case on the structure of single family offices. Click the links above to access the presentation materials.

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