

NEWS

Caitlin Horne serves as speaker for 32nd Annual RPTE National Conference

Speaking Engagements
May 2020

Charlotte Estate & Wealth Planning Associate Caitlin Horne presented at the ABA 32nd Annual RPTE National CLE Conference, The Virtual Experience 2020 on May 14. Horne joined the virtual panel discussion for the topic "Tax Planning for Closely-Held Business Interests Before a Liquidity Event." This presentation discussed a range of tax planning strategies to raise with clients before a sale or IPO of a closely-held business. Topics included:

- Gift, estate and generation-skipping transfer tax planning
- Income tax planning, including utilizing trusts for state income tax and taking advantage of Section 1202 qualified small business stock tax efficiency
- Maximizing the charitable deduction (or, avoid limitations on income tax charitable deductions)
- Important timing considerations
- Importance of appraisals including a review of the applicable valuation discounts attributable to closely-held business interests
- Implications if the liquidity event does not take place

The ABA 32nd Annual RPTE National CLE Conference brings people together for networking, education, and discussion of national topics in Real Estate and Trust and Estate Law. To learn more about the ABA 32nd Annual RPTE National CLE Conference, please [click here](#).