Tax Reform – Questions?

WE HAVE ANSWERS!

Join us Wednesday, September 12, 2018, to learn about how the new tax law is impacting charitable planning for individuals and businesses. This free presentation will be led by experts in the field:

- Bradley R. Crockett, CFP®*
  Vice President and Senior Wealth Planning Analyst
  Wilmington Trust
- Matthew M. McNelis, CPA*
  Partner
  Baker Tilly

**Please see included biography*

Wednesday, September 12 at Frosty Valley's Iron Fork Banquet Room (2 options)

Lunch Session: Individual/Family Focus

12:00pm – Sandwich lunch buffet
12:30pm-1:30pm – Presentation

- *Key changes due to tax reform and impacts on charitable gifting*
- *Estate tax exemption*
- *Standard vs. itemized deductions*
- *Strategies to maximize the benefits of gifting, post tax reform*
- *Bunching*
- *Donor advised funds*
- *Qualified charitable distributions*

Afternoon Session: Business Focus

4:00pm – Hors d'oeuvres
4:30pm-5:30pm – Presentation

- *Key changes due to tax reform and impacts on charitable gifting*
- *Strategies to maximize the benefits of gifting, post tax reform*
- *Tax reform opportunities and strategies for business owners*
- *Pennsylvania state tax credits*
- *Estate tax and wealth transfer planning*
- *Liquidity and income tax planning*
- *Insurance policy reviews*

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Reserve your spot today! Please RSVP through Eventbrite at *https://cscfgiving.eventbrite.com* or to Karri Harter by September 5: *kharter@csgiving.org or 570-752-3930, ext. 6*

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Bradley R. Crockett, CFP®

Vice President and Senior Wealth Planning Analyst
Wilmington Trust

Brad is responsible for developing customized wealth management and financial plans for prominent individuals, families, and business owners throughout the mid-Atlantic region. He works closely with other professional and family advisors to analyze financial positions and develop plans to help clients achieve future personal and financial goals. Before joining Wilmington Trust, Brad was the Manager of Strategic Planning at Saint Agnes Hospital in Baltimore.

Brad earned an MBA from Johns Hopkins University, and earned his undergraduate degree in Business Management from the University of Delaware. Additionally, Brad is a CFP®professional having earned the CERTIFIED FINANCIAL PLANNER™ certification. He currently volunteers as a mentor with the Big Brothers Big Sisters of the Greater Chesapeake.

Specific Experience

- *Cash Flow Sustainability*
- *Retirement Planning*
- *Financial Statement Analysis*
- *Business Succession Planning*

Matthew M. McNelis, CPA

Partner
Baker Tilly

Matt has been practicing in public accounting for over 12 years, assisting clients with an assortment of tax matters. His area of expertise is providing tax services to a variety of small business and mid-market clients specifically focusing on closely held businesses and related shareholder/owner tax issues. He has extensive experience serving engineering firms and construction companies and providing strategic tax applications and techniques including accounting method changes, fixed asset reclassifications, inventory issues and guidance on tax accounting issues related to long-term contracts to clients across the manufacturing, distribution, construction and real estate industries.

Specific Experience

- *Experience with S-corporations, business sales and acquisitions, consolidated tax returns and limited liability companies*
- *Identifying accounting method change opportunities for clients and reviewing accounting method change applications*
- *Identifying appropriate long-term contract methods for construction I manufacturing clients and providing guidance on potential application of lookback interest and Alternative Minimum Tax (AMT) adjustments*
- *Examining fixed asset records for clients and identifying potential reclassification opportunities to accelerate cost recovery including appropriate methods/conventions, cost segregation studies and repairs and maintenance studies*
- *Providing technical guidance on tax sections of the Affordable Care Act (ACA) including identifying sources subject to the Net Investment Income (NII) tax and consultation on tax planning to minimize the tax impact of NII to clients*
- *Licensed CPA in Pennsylvania*

Industry Involvement

- *American Institute of Certified Public Accountants (AI CPA)*
- *Pennsylvania Institute of Certified Public Accountants (PI CPA)*

Education

- *Susquehanna University*
- *Bachelor of Science in accounting*