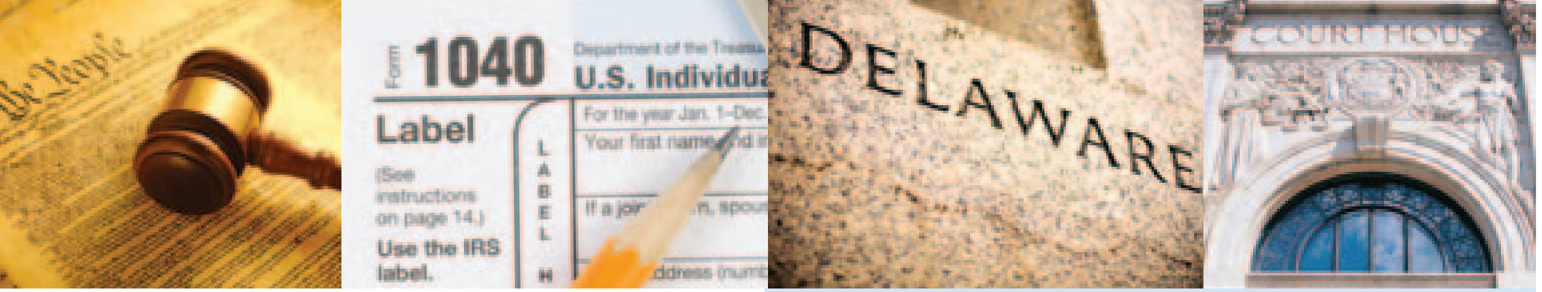


Course Credit

The 2021 Delaware Tax Institute program has been approved for a total of 4 CLE credits (including 1 ethics credit) in Delaware and Pennsylvania and up to 4.8 CPE credits in tax.

NASBA Credits

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour.

Widener University Delaware Law School is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. NASBA website: **www.nasba.org.**

No prerequisite or advance preparation is required for the 2021 Delaware Tax Institute program.

Payment Information

Registration fee . . . . $100.
Students . . . . Free

Registration Information

Please register online at
delawarelaw.widener.edu/delawaretax

For More Information

on registration, refund, complaint, program cancellation policies, accessibility, and special needs requests, please contact:

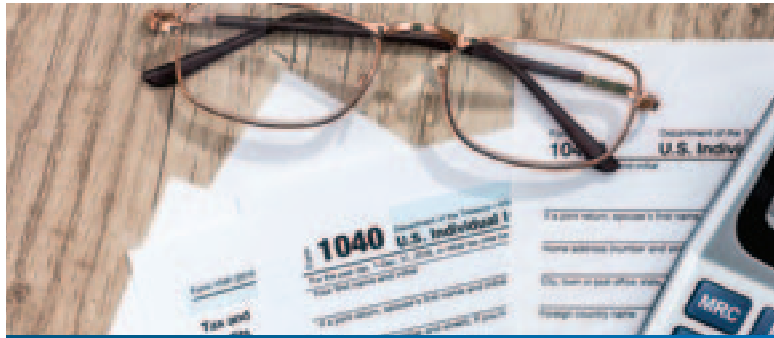
Contact: Carol Perrupato
Phone: 302-477-2178
E-mail: caperrupato@widener.edu

Widener University
Delaware Law School
4601 Concord Pike, Wilmington, DE 19803-0406

2021 Delaware Tax Institute

There's No Masking Impending Tax Updates

Co-sponsored by Widener University Delaware Law School, Estate Planning Council of Delaware, Society of Financial Service Professionals - Delaware Chapter, and the Delaware State Bar Association



Presentations on 2021 Income Tax Developments; Estate Planning and Gift Tax Update; Ethics

Thursday, November 18, 2021
8:00 a.m – 12:30 p.m.
VIA ZOOM

Distinguished Speaker:
Jared Bernstein, a member of the Council of Economic Advisers serving President Joseph R. Biden since 2021.

Widener University
Delaware Law

2021 Delaware Tax Institute

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Presentations on 2021 Income Tax Developments; Estate Planning and Gift Tax Update; Ethics

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Learning Objectives

- Define the changes and new developments in current legislative, regulatory, and judicial income, estate, and gift tax.
- Identify recent federal and state income, estate, and gift tax planning considerations.
- Differentiate a business perspective from a tax perspective on business transactions encountered in a tax and/or legal practice.

Who Should Attend?

Accountants, CPAs, Tax Professionals, Attorneys, Tax Attorneys, Educators, Financial Institutions/Banking/Insurance/Financial Services Professionals

Program Level

Basic

Delivery Method

Group Live/Internet Based

Course Materials

Will be provided electronically

Location

Via ZOOM

Refund Policy

Requests for refunds must be received in writing by November 18, 2021. No refunds will be granted after November 18, 2021.

Agenda for:

Thursday, November 18, 2021

8:00–8:15 am **Welcome – Rodney A. Smolla**
Dean & Professor of Law
Widener University Delaware Law School

8:15–9:15 am **Income Tax Planning**

Moderator: Kathy S. Schultz, CPA, AEP
Belfint Lyons & Shuman, P.A.

Panelist: Michael D. Kelly, CPA
Belfint Lyons & Shuman, P.A.

9:15–10:15 am **Recent Developments in Estate Planning**

Moderator: Daniel F. Hayward, Esquire
Gordon Fournaris & Mammarella, P.A.

Panelists:

Janice M. Matier, Esquire
Richards Layton & Finger, P.A.

Jennifer E. Smith, Esquire
McCollom D'Emilio Smith Uebler LLC

10:15–-10:30 a.m. **BREAK**

10:30–11:30 a.m. **Distinguished Speaker:**
Jared Bernstein
A Member of the Council of Economic Advisers to President Joseph R. Biden

11:30 a.m.–12:30 p.m. **Confidentiality, Conflicts and Candor: Three Hot Issues in Tax-related Counseling and Litigation**

Moderator: Matthew F. Boyer, Esquire,
Partner—Connolly Gallagher LLP

Panelist: Scott E. Swenson, Esquire
Connolly Gallagher LLP

12:30 pm **Adjourn**