

## **Westport Legal Breakfast Roundtable Discussion Series: Navigating the Current Estate Planning Landscape to Meet Client Goals**

---

February 11, 2020 | 7:30 a.m. - 9:00 a.m.  
253 Post Road West, Westport, CT 06880

Please join us on February 11, 2020, in our new and expanded Westport office for a roundtable discussion led by Trusts and Estates law attorneys Lauren C. Davies and David B. Bussolotta on the topic, “Navigating the current estate planning landscape to meet client goals.”

Topics of discussion will include:

- Planning for 2020’s increase in federal and Connecticut estate tax exemptions. How will the eventual federal “sunset” on December 31, 2025 impact estate plans? Who should consider taking advantage of these exemptions prior to 2025 without concern about an IRS claw-back once the exemptions decrease? How should clients plan around the continuous uncertainties of estate tax laws?
- Planning for the new 2020 retirement planning rules in the SECURE Act of 2019: Who benefits and who loses? Who should take steps now to check their estate and retirement under the new rules? Who should consider alternate planning steps to minimize the greater income tax impact on children and grandchildren?
- Special Needs Trusts: the rules, benefits, and consequences.

### **February 11, 2020**

7:30 a.m. – 8:00 a.m.: Registration and Networking  
8:00 a.m. – 9:00 a.m.: Breakfast and Discussion

Pullman & Comley, LLC  
253 Post Road West, 3rd Floor  
Westport, CT 06880

To register, please email [roundtable@pullcom.com](mailto:roundtable@pullcom.com) or call 203.330.2106.

---

**pullcom.com**  @pullmancomley

**BRIDGEPORT** | **HARTFORD** | **SPRINGFIELD** | **WAKEFIELD** | **WATERBURY** | **WESTPORT** | **WHITE PLAINS**  
203.330.2000 | 860.424.4300 | 413.314.6160 | 401-360-1533 | 203.573.9700 | 203.254.5000 | 914.705.5355

## Westport Legal Breakfast Roundtable Discussion Series: Navigating the Current Estate Planning Landscape to Meet Client Goals

---

### **Professionals**

David B. Bussolotta

Lauren C. Davies

Alan S. Parker

James B. Stewart

### **Practice Areas**

Trusts and Estates