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Trust Structuring for Founders

Optimize tax efficiency and maximize the outcome of your liquidity event



Discuss essential strategies on how to establish and leverage trusts to optimize tax efficiency and maximize the outcome of your liquidity event. Our expert panel will delve into the intricacies of trust formation, address common pitfalls, and offer practical advice tailored to founders' unique needs.

Wednesday, April 24
2:00-2:45pm ET

[Click here to RSVP](#)

RSVP by
Tuesday, April 23

Speakers

Catherine McDermott

Senior Wealth Strategist
UBS Advanced Planning Group

Stuart Morris

Office Managing Partner
Cozen O'Connor

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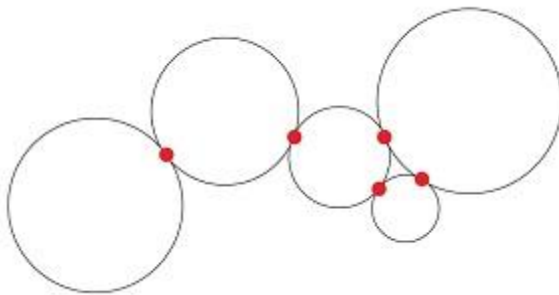


**Sarah Ponczek, CIMA[®],
CFP[®]**
Vice President - Wealth
Management

BV Group

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