Date: Thursday, September 17, 2020

Time: 12:30pm - 4:00pm

Location: WebEx Virtual Seminar

Speaker: Ramsay H. Slugg, Brett Bluestein, Austen R. Hawkey, Paul G. Trippe (Bank of America)

“Stupid Charitable Tricks: Planning Mistakes I Have Seen”

Presented by :

Ramsay H. Slugg

Managing Director

National Wealth Planning Strategies

Private Bank

Bank of America

Presidential Candidates Tax Policies and Tax & Estate Planning Strategies in the Current Environment

Presented by:

Brett Bluestein

Senior Vice President

Wealth Strategist

Private Bank

Bank of America

Secure Act Planning Considerations

Presented by:

Austen R. Hawkey

Vice President

Associate Wealth Strategies Advisor

Private Bank

Bank of America

Economic and Market Update

Presented by:

Paul G. Trippe

Managing Director

Senior Portfolio Consultant

Private Bank

Bank of America