

# The New Tax Plan and What It Means for You

March 14, 2018

Presentation Materials:

- Seminar Powerpoint Presentation
- Outline for the Family Business Ramifications of New Tax Plan Act
- Estate Planning Alert: Tax Cuts and Jobs Act of 2017

Join Gray Plant Mooty's Trust, Estate and Charitable Planning team to find out what you need to know!

With the new tax law, everything has changed – from estate and gift tax exclusions, to income tax deductions and rates, to how business entities are taxed. We'll give you the information you need to know about how the new tax law will impact you and your family and provide you with planning strategies to meet your objectives. Following the seminar, we invite you to stay and join us for a reception to connect with other attendees and our team!

See below for the agenda topics that will be discussed at the seminar, and feel free to bring your colleagues should the subject matter be of interest to them! We hope to see you at Windows!

Agenda:

- Charitable Giving Strategies That Still Thrive, presented by *Sheryl Morrison* and *Edward Tully*
- Business Planning Considerations for Family Entities, presented by *Sally Stolen Grossman* and *David Bahls*
- Minnesota's Estate Tax and Residency Landscape, presented by *Matt Shea* and *Marya Robben*
- The New Tax Act: Federal Tax Law Changes and Planning Strategies, presented by *Jim Lamm* and *Holly Okland*

## Related People



**David C. Bahls**  
Principal  
Minneapolis, MN  
Direct: 612.632.3008  
[david.bahls@gpmlaw.com](mailto:david.bahls@gpmlaw.com)



**Sally Stolen Grossman**  
Principal  
Minneapolis, MN  
Direct: 612.632.3007  
[sally.grossman@gpmlaw.com](mailto:sally.grossman@gpmlaw.com)



**Sheryl G. Morrison**  
Principal  
Minneapolis, MN  
Direct: 612.632.3376  
[sheryl.morrison@gpmlaw.com](mailto:sheryl.morrison@gpmlaw.com)



**Marya P. Robben**  
Principal  
Minneapolis, MN  
Direct: 612.632.3010  
[marya.robben@gpmlaw.com](mailto:marya.robben@gpmlaw.com)



**Matthew J. Shea**  
Principal  
Minneapolis, MN  
Direct: 612.632.3428 (MN),  
701.298.6183 (ND)  
[matt.shea@gpmlaw.com](mailto:matt.shea@gpmlaw.com)



**Edward H. Tully**  
Principal  
Minneapolis, MN  
Direct: 612.632.3445  
[edward.tully@gpmlaw.com](mailto:edward.tully@gpmlaw.com)