



Date	Location	Topic	IP	Zoom
October 22	Zoom LVC	Business Valuation in Practice		☐
October 27	Zoom LVC	Post-Mortem Tax Planning: A roadmap for Executors & Heirs		☐
October 29	Zoom LVC	Tax-Smart Savings Strategies: Trump accts, Roth Conversions & 529 Plans		☐
November 10	Waltham / Zoom LVC	Understanding & Efficiently using Joint Revocable Trusts to Maximize MA \$2M Exemption for estates under \$15M **	☐	☐
November 4	Zoom LVC	Choice of Entity & Conversation of Business Entities after the OBBBA		☐
November 10	Waltham / Zoom LVC	Intermediate and Advanced Estate Planning Techniques	☐	☐



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