

November 14, 2013

Date | Time | Location

Estate Planning and Wealth Management: What to Do?

Organizer

Joseph M. Brodecki, Principal, Bernstein Global Wealth Management

Presenter

Paul S. Lee, National Managing Director, Bernstein Global Wealth Management

Presentation Overview

Estate planning and wealth management strategies represent some of the biggest challenges CXOs will face from a personal perspective, as well as a business owner. We will discuss recent events and strategies to help build and preserve your wealth.

Presentation Key Takeaways

1. What impact will new tax laws have on personal wealth planning, and company exit planning?
2. What does the new estate tax law mean to me personally, as well as to owners of closely held businesses?
3. What is the future of the income tax code?
4. As a CXO, what questions should I ask about taxes related to my wealth?
5. How important is state of residence now for tax planning?
6. How does spending impact my wealth?
7. Have the retirement rules changed as a result of the state of the capital markets?
8. How do the new tax laws impact tax planning surrounding liquidity events?

About Our Presenter



Paul S. Lee is a National Managing Director of Bernstein Global Wealth Management, a position he assumed in 2006; he is also a member of the firm's Wealth Management Group, which he rejoined in 2008. Previously, he had been a managing director in the London and New York offices.

Prior to joining the firm in 2000 as a Wealth Management Group director, he was a partner in the Atlanta-based law firm of Smith, Gambrell & Russell, LLP. Lee received a BA, cum laude, in English and a BA in chemistry from Cornell University, and a JD, with honors, from Emory University School of Law, where he was notes and comments editor of the Emory Law Journal; he also received an LLM in taxation from Emory University. Lee was the recipient of the Georgia Federal Tax Conference Award for Outstanding Tax Student and the Ernst & Young Award for Tax and Accounting.

THURSDAY
November 14, 2013

7:30 AM to 8 AM
Networking and
Continental Breakfast

8 AM to 9 AM
CXO Forum
Presentation

9 AM to 9:15 AM
Burning Issues: Discuss
your specific challenges
with colleagues and
fellow CXO Forum
members

Location
Cherry Bekaert
1934 Old Gallows Road
4th Floor
Vienna, VA 22182
703.506.4440

For directions, visit
www.cxoforum.com

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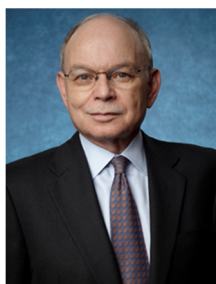
Volunteer For A Committee

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A frequent lecturer and panelist on investment planning and tax and estate planning, Lee has spoken at the Heckerling Institute on Estate Planning, the ACTEC National Meeting, the ABA Tax-RPTE Joint National CLE Conference, the Southern Federal Tax Institute, the USC Institute on Federal Taxation and the Notre Dame Tax and Estate Planning Institute. His articles have been published by The ACTEC Law Journal; BNA Tax Management Estates, Gifts and Trusts Journal; BNA Tax Management Memorandum; The Practical Tax Lawyer; Major Tax Planning; Trusts & Estates; and the Emory Law Journal.

About Our Organizer



Joe Brodecki is a Principal in the Private Client Practice of Bernstein Global Wealth Management, Inc. He is a co-founder of the firm's Washington, DC office. Mr. Brodecki was again named one of Washington's best wealth advisors by Washingtonian Magazine (November 2012). Mr. Brodecki, active in the not for profit sector, led the international effort that produced \$200 million to finance the creation of the United States Holocaust Memorial Museum. He is a Presidential (of the United States) appointee to the United States Holocaust Memorial Museum Council, the Museum's governing board. He volunteers his professional skills as a member of numerous boards and committees.

Mr. Brodecki and his wife, Shelley, an artist, have two daughters, Talia a Stanford University graduate, Masters in Management Science and Engineering, who is a Product Marketing Manager for Google in Australia and Asia, and Ariella an American University graduate, Masters in Special Education, who teaches in Montgomery County, Maryland.

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