

Course Announcement:

“Place Your Bets”: HOW CHANGING POLITICAL AND ECONOMIC CONDITIONS CAN BE FACTORED INTO 2024 WEALTH MANAGEMENT & TAX PLANNING.

1. Course Name, Date, Location:

”Place Your Bets” How Changing Political and Economic Conditions can be Factored into 2024 Wealth Management and Tax Planning; May 15, 2024, New York, NY

2. Smart Learning Objectives: Attendance at the above presentation will provide attendees with:

- An overview of the revenue considerations to impact future tax legislation.
- A summary of the areas of tax law under consideration to increase compliance and revenue.
- A review of how major political events, such as the presidential election could impact legislation.
- A summary of major individual changes to occur on the sunset of Tax Cuts and Jobs Act of 2017.
- A summary of major estate and gift changes to occur on the sunset of present law.
- A recap of existing planning opportunities available under current law.
- What will be the impact on areas such as charitable gifting?
- Considerations related to trust administration.
- Keys to a successful tax plan.

3. Target Audience: This course was designed for Senior Associates and above in the Tax practice; as well as various estate tax planners.

4. Course Description: This course provides participants

with a summary of the areas of tax law under consideration to increase compliance and revenue. It discusses ways in which major political events, such as the presidential election could impact legislation. It provides a summation related to some of the major individual changes to occur on the sunset of Tax Cuts and Jobs Act of 2017. Also, there is a summary of major estate and gift changes to occur on the sunset of the present law; a recap of existing planning opportunities available under current law; a look on the potential impact on charitable giving and trust administration. The course will also discuss the keys to a successful tax plan.

5. NASBA Delivery Method: The NASBA Delivery Method for this CPE Course is Group Live.

6. Estimated CPE Credit and Fields of Study: 1 CPE Credit; **Field of Study:** Code 81-Taxes-Technical; Estate and Trust Taxation

7. Prerequisites: None

8. Advance Preparation: There is no advance preparation

for this course.

9. Course Knowledge Level: Overview

**10. KPMG Accommodations Statement (KPMG Policy)-
This statement must be included**

KPMG provides reasonable accommodations to individuals who request assistance for participating in any KPMG sponsored meeting, event, or training course. Requests should be submitted through the [Requesting an Accommodation](#) portal page at least 2 weeks prior to the course's start date.

11. Course Registration Requirements:

Training being held at the Committee of Banking Institutions on Taxation (CBIT) Spring Tax Day in NYC.
Registration can be completed on-line at "CBIT-USA.org" or in person on the day of the event.

12. Refund/ Cancellation Policy: \$75 Registration fee refunded at least 3 days before the event.

13. Complaint Resolution Policy: Any questions or issues with this course may be emailed to Michael Macero at mmacero@kpmg.com

14. Official NASBA CPE sponsor statement (NASBA CPE policy) – this statement must be included without any modification.

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