



13th Annual Fiduciary Focus

02.25.2022

Video Summary: The 13th Annual Fiduciary Focus event covered insights and recent developments affecting fiduciaries ? Tammy Calabrese, Dan Durst, and Ben Pace discussed tax law updates (and those on the horizon), potential Virginia and Federal legislative changes as well as recent litigation you need to know about. Farhad Aghdami, Kevin Bender, Jenny Connors, Jim Head, and Christine Piersall examined the challenges of planning with unique assets such as cryptocurrency, art, retirement accounts, charitable trusts and other incentives such as Qualified Opportunity Zones (QOZs) and Section 1202 Qualified Small Business Stock (QSBS). Farhad Aghdami and Tammy Calabrese closed with a presentation on modifying an irrevocable trust.

Join the Williams Mullen Private Client and Fiduciary Services team for our annual Fiduciary Focus event. This year's agenda is packed with insights on recent developments affecting fiduciaries ? including tax law updates (and those on the horizon), potential Virginia and Federal legislative changes as well as recent litigation you need to know about.

Our team will also provide tips for planning with unique assets such as cryptocurrency, art, retirement accounts, charitable trusts and other incentives such as Qualified Opportunity Zones (QOZs) and Section 1202 Qualified Small Business Stock (QSBS). We will close by helping you determine whether an irrevocable trust is indeed permanent.

AGENDA

FIDUCIARY FOCUS 2022

9:00 – 9:05 AM	Welcome - <i>Christine Piersall</i>
9:05 – 9:55 AM	Recent Developments Affecting Fiduciaries <i>Speakers: Tammy Calabrese, Dan Durst and Ben Pace</i>
9:55 – 10:45 AM	Planning with Unique Assets: Crypto, QOZs, QSBS, Art, and Retirement Plans <i>Speakers: Farhad Aghdami, Kevin Bender, Jenny Connors, Jim Head and Christine Piersall</i>
10:45 – 10:55 AM	Break
10:55 – 11:45 AM	Is It Truly Irrevocable? How to Modify or Terminate an Irrevocable Trust <i>Speakers: Farhad Aghdami and Tammy Calabrese</i>
11:45 AM – 12 PM	Questions and Close - <i>Christine Piersall</i>

Related People

- Farhad Aghdami ? 804.420.6440 ? aghdami@williamsmullen.com
- Kevin G. Bender ? 804.420.6427 ? kbender@williamsmullen.com
- Jenny H. Connors ? 804.420.6582 ? jconnors@williamsmullen.com
- Daniel J. Durst ? 804.420.6465 ? ddurst@williamsmullen.com
- W. Benjamin Pace ? 804.420.6932 ? wpace@williamsmullen.com
- Christine Nguyen Piersall ? 757.629.0703 ? cpiersall@williamsmullen.com

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