

TODAY'S AGENDA

11:00 AM ET	Welcome & Housekeeping
11:15 AM ET	Tax Deduction Planning Opportunities Post OBBBA
12:10 PM ET	Break
12:15 PM ET	529 Plans VS Trump Accounts
1:15 PM ET	Break
1:30 PM ET	Unlocking the Benefits of Qualified Small Business Stock
2:30 PM ET	Extended Break
3:00 PM ET	Optimizing IRAs and Roth Conversions After OBBBA and the Secure Act
4:00 PM ET	Break
4:10 PM ET	Adjusting Irrevocable Trusts
5:10 PM ET	Break
5:20 PM ET	Expert Panel: Post OBBBA Tax Planning Ideas To Discuss With Clients
6:20 PM ET	Event Ends