SpencerFane®

Samuel DiPietro to Lead January Estate Planning Seminar

January 29, 2025
11:30 am MST - 1:00 pm MST
Seasons 52 Biltmore | 2502 E. Camelback Road Phoenix, AZ 85016

Spencer Fane attorney Samuel DiPietro will collaborate with Bayntree Wealth Advisors on January 29 for the CPA continuing education session, Estate Tax Exemption Sunset 2026, in Phoenix, Arizona.

This presentation will provide key considerations for financial planning professionals and their clients ahead of the 2026 Sunset of the Federal Estate Tax Exemption. Samuel will explain the impact of this change and deliver a high-level overview of planning techniques utilized to mitigate or, in some cases, eliminate a client's estate tax exposure.

At Spencer Fane, Samuel collaborates with families and their advisers to create customized estate plans that consider the specific needs of each family, ensuring the protection and seamless transfer of wealth. He has extensive experience crafting estate plans tailored to the unique requirements of modern families, experience he also frequently employs to serve as an industry thought leader.

RSVP for Samuel's presentation here. Please note, seating is limited.