



# Senior Seminar

## Estate Planning & Tax Strategies

Heath Village is proud to partner with Nisivoccia for an introductory discussion regarding estate planning and tax strategies for seniors.



Glenn Schwier, CPA, JD and Partner at Nisivoccia LLP will be presenting at the seminar. Glenn specializes in personal tax matters including estates, trusts and individual tax strategy.



### Topics for discussion:



- ◆ Learn if your assets are controlled by your Will or other document(s)
- ◆ Probate vs non-probate property
- ◆ Charitable planning through charitable gift annuities and remainder trusts
- ◆ New Jersey inheritance tax and beneficiary classes
- ◆ Who pays the tax?
- ◆ When do you need to file a Federal Estate tax return?

**Tuesday, August 9, 2022**  
**2:00 pm at Heath Village**

**RSVP is required. Please call 908-684-5009 to make a reservation.**

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