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## Annual Update on Estate Planning & New Tax Updates

Please join Isler's Estate and Trust Director, Mary Fipps, and Tax Partner, Joseph Lewis, for a wine and cheese gathering and discussion on Estate Planning Tips and Tricks. As a certified instructor for the Oregon Insurance Commission, Mary has been a featured speaker and instructor at the local and state level for more than ten years.

The presentation will include such topics as:

- What are the essential estate documents?
- What are the tax filing requirements of an estate?
- What are the important conversations with the family after death?
- Who do I need on my estate team?
- What are the trustee responsibilities?
- Who are the beneficiaries?
- Who needs a bypass trust?
- Do I still need a revocable living trust?
- How do I safeguard assets?
- How to Inventory and Value my estate?

**DATE: Wednesday, December 5, 2018**

**TIME: 6:00 - 7:30 PM**

**LOCATION: The John G. Shedd Institute for the Arts Recital Hall  
868 High Street, Eugene, OR 97401**

RSVP to [info@islercpa.com](mailto:info@islercpa.com) or 541-342-5161

