

West Palm Beach Trusts & Estates Seminar



January 22, 2025 | **EVENTS**

**WEST PALM BEACH
TRUSTS & ESTATES
SEMINAR**

Presented by  **LippesMathias**^{LLP}
ATTORNEYS AT LAW

Lippes Mathias LLP | 4420 Beacon Circle, West Palm Beach, FL 33407 | 561-842-3000

**THURSDAY,
FEBRUARY 27**

@ Wyndham Grand Jupiter
at Harbourside Place

Seminar: 1:30 - 4:30 PM
Networking: 4:30 - 5:30 PM

Register Here

In today's complex financial landscape, protecting your assets and ensuring financial security requires thoughtful guidance.

Join our attorneys, including attorneys from the former 37-year-old West Palm Beach law firm Ward Damon, PL, for a complimentary Trusts & Estates Seminar that will provide critical insights into essential estate planning strategies that can save time and money, while avoiding potential legal complications.

Thursday, February 27, 2025

Check-in/ Registration: 1:30 - 2:00 PM

Seminar: 2:00 - 4:30 PM

Networking & Cocktails: 4:30 - 5:30 PM

Wyndham Grand Jupiter at Harbourside Place, 122 Soundings Avenue, Jupiter, FL 33477

Seminar Highlights:

- Discover strategies for avoiding costly Florida probate processes
- Learn how to efficiently transfer assets while minimizing tax implications
- Understand the unique legal considerations for Florida residents

Key Takeaways:

- Avoiding Florida Probate: Strategies and Legal Techniques
- Blended Family Planning: Protecting All Family Members' Interests
- Maximizing Beneficiary Designations for Optimal Asset Transfer
- Estate Planning Considerations When Moving to Florida
- Strategic Estate Planning for IRA Accounts under the Secure 2.0 Act
- Comprehensive Asset Protection Strategies

Related Team



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