

# Breaking It Down: Key Implications of the Tax Reform Plan on Family and Closely Held Businesses

Co-sponsored Event  
January 24, 2018  
Bellevue and Seattle, WA

Garvey Schubert Barer, Clark Nuber PS and Key Private Bank invite you to a panel presentation on how to prepare your family and closely held business for upcoming tax reform changes. Their legal, accounting and wealth management advisors will unravel the key details of the new tax bill and explain how you and your business may be affected and can benefit under the new plan.

**Cost:** Seats are \$30.

Bellevue - Breakfast Presentation, 7:30 - 10:00 AM  
Skyline Tower, Clark Nuber PS,  
10900 NE 4th St., 14th Fl., Bellevue, WA 98004  
[Register now for the Bellevue program](#)

Seattle - Lunch Presentation at 11:30 AM - 2:00 PM  
Rainier Club, 820 4th Ave., Seattle, WA 98104  
[Register now for the Seattle program](#)

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## **PROGRAM AGENDA**

### **Welcome & Introductions**

*Julie Eisenhauer, CPA | Shareholder at Clark Nuber*

### **Tax Reform: Big Changes for Small Businesses**

Outlining how family and closely held businesses will be impacted by the 2017 Tax Cuts and Jobs Act. Topics include depreciation, employee fringe benefits, excess business losses and the repeal of corporate AMT and Section 199.

*Rene Schaefer, CPA, MST | Principal at Clark Nuber*

### **Tax Reform: What's in It for You?**

An exploration of the implications for individuals due to the recent tax reform. Topics include changing tax rates, itemized deduction differences, and the special rate for pass-through income.

*Megan Kuchan, CPA | Senior Manager at Clark Nuber*

**While Estate Planning with the New Federal Exemption, Don't Forget the State Estate Tax**

A discussion of how family and closely held business owners should address business succession issues in light of the new \$11.2 million per person federal estate tax exemption while the state estate tax exemption remains at \$2.193 million per person.

*Hal Snow | Principal at Garvey Schubert Barer*

**Hitting Home: A Family Business Case Study**

In this roundtable discussion, our advisors from accounting, law and wealth management take a real-world example and apply their unique perspectives and insights to help a family business navigate the intricacies of the new tax legislation.

**Moderator:** *Julie Eisenhauer, CPA | Shareholder at Clark Nuber*

**Panelists:** *Rochelle Haller | Principal at Garvey Schubert Barer, Rene Schaefer, CPA, MST | Principal at Clark Nuber, and Megan Kuchan, CPA | Senior Manager at Clark Nuber*

**Gauging the Effects of the Tax Legislation on an Aging Economic Cycle**

While many believe that the 2017 Tax Cuts and Jobs Act will provide increased economic growth, the advanced stage of the cycle suggests that it may also hasten the next recession.

*Jennie Tyndall | SVP, Senior Portfolio Manager at Key Private Bank (Bellevue)*

*Bruce McCain, Ph.D., CFA | Chief Investment Strategist at Key Private Bank (Seattle)*