



End of Year Individual Tax Planning

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- Stay Ahead of the Curve
 - TCJA Sunset
 - Will the past dictate the future?
 - What is set to expire at the end of 2025?
- Post Election Tax Update
 - President-elect Trump's campaign tax policy proposals
- Gifting strategies for high net-worth individuals
 - Alternative uses of the increased exclusion amount
 - Long-term planning concerns
- Q&A

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