September 22, 2020 Meeting

The next scheduled program for the Knoxville Estate Planning Council will be an on-line presentation on Tuesday, September 22, 2020.

Shining Light Through Darkness (Planning in the Shadow of Uncertainty, Social Distancing, and Fear)

Paul S. Lee, JD LLM—Chief Tax Strategist, The Northern Trust Company

The COVID-19 pandemic has stalled global economies, causing asset values and interest rates to plummet. Clients are fearful for their health and wealth, and of the uncertainty that lies ahead. The best estate planners can be a beacon of light during these dark times, providing wise counsel and devising plans that clients can act upon today, with assurance that they will survive these turbulent times (and even take advantage of the current planning environment).

Course objectives: This presentation will discuss the best planning ideas and techniques, in light of these unprecedented times.

Paul S. Lee is the Global Fiduciary Strategist of The Northern Trust Company, within the Global Family & Private Investment Offices Group and Wealth Management division of Northern Trust. He is also a Senior Vice President and Managing Director of the company. Prior to joining Northern Trust, he was at Bernstein Global Wealth Management as National Managing Director, and a partner in the Atlanta-based law firm of Smith, Gambrell & Russell, LLP. Paul is a Fellow of the American College of Trusts and Estate Counsel, has been inducted into the NAEPC Estate Planning Hall of Fame®, and designated an Accredited Estate Planner® (Distinguished). He is the American Bar Association Advisor to the Uniform Law Commission Uniform Fiduciary Income and Principal Act. Paul is a member of the American Bar Association, Florida Bar, and State Bar of Georgia.

Member Contact Information

KEPC's main form of communication is email. If any of your profile information changes, especially your email, please update the necessary information on the KEPC website (kepctn.org). Meeting announcements, membership renewals, and other information is delivered via email. Please do not uncheck the "Contact Preference" for email under "Contact Information" . This feature allows KEPC to send emails to members but will not display your email if that is your preference. Regular meeting announcements are sent out in January, March, May, September, and November. Membership renewals are sent out in August. If you stop receiving regular emails, please contact Carol Bangash.

Please RSVP ASAP. Guests are welcome to attend the meeting with a member. There is a guest fee of $35. Students and emeritus members have a special rate of $10. To register for this course, go to **kepctn.org**, or call 865-474-7360.

Delivery Method: Group Live

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

CLE, CLU, CPE Credit: 1 hour Tax

CPE Credit: 1 hour Tax

Due to this program being presented free of charge, there will be no refunds issued. For more information regarding refund, complaint and program cancellation policies, please contact our offices at 865-474-7360.

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Knoxville Estate Planning Council

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