**Program Description and Brief Bio**

**Title:**

Pre-Liquidity Tax Planning for Founders and Executives

**Description:**

When it comes to preparing for a significant business liquidity event, the key is to plan early and often. How do you successfully navigate the transition from entrepreneur to investor while balancing succession and wealth transfer planning? This presentation offers insights and strategies to help founders and executives address qualified small business stock (QSBS), qualified opportunity zones (QOZs), charitable planning, valuation discounts, and multigenerational trust planning.

Program topics include:

* Gift, Estate and GST Tax Planning
* Charitable Planning and Donor Advised Fund Developments
* Qualified Small Business Stock (QSBS) Under Section 1202
* Qualified Opportunity Zones: QOZs, QOFs, QOZPs, QOZBs, QOZBPs
* Recent Developments and Proposed Legislation

**Speaker:**

Justin Miller, J.D., LL.M., TEP, AEP®, CFP®

Partner and National Director of Wealth Planning, Evercore Wealth Management

Managing Director, Evercore Trust Company

**Brief Bio:**

Justin Miller is a Partner and National Director of Wealth Planning at Evercore Wealth Management and a Managing Director at Evercore Trust Company, where he works collaboratively with accountants, attorneys, and other advisors to provide comprehensive wealth planning advice to clients. Justin also is an adjunct professor at Golden Gate University School of Law, a Fellow of the American Bar Foundation, and a Fellow of the American College of Trust and Estate Counsel. In addition, he is a frequent speaker at major conferences, has published numerous articles, and is regularly quoted as an industry expert in the media. Justin received a B.A., with honors, from the University of California, Berkeley, and a J.D. and LL.M. in Taxation from New York University School of Law.