

FINANCIAL AND ESTATE PLANNING COUNCIL OF METROPOLITAN DETROIT

presents

Jordon Rosen, CPA, MST, AEP®

“Tax Cuts and Jobs Acts – What’s New?”

Highlights and Impact of Tax Cuts and Jobs Act on Individual Taxpayers
Mechanics and Planning Around the Qualified Business Income (QBI) Deduction
Select Business Changes Made by TCJA

TUESDAY, FEBRUARY 12, 2019

Skyline Club

2000 Town Center, Southfield, MI 48075

Jordon N. Rosen, CPA, MST, AEP® is a Director and shareholder in the Wilmington, Delaware CPA firm of Belfint, Lyons & Shuman, where he heads the firm’s estate and trust practice. Jordon also provides tax consulting and compliance services to the firm’s higher net worth clients and business owners. He is a past President of the National Association of Estate Planners and Councils (NAEPC) and has served as president of the Delaware Estate Planning Council and the Chester County, PA Estate Planning Council. Mr. Rosen is also the past Chair of the Tax Committee of the Delaware State Chamber of Commerce, is a past member of the AICPA Trust, Estate and Gift Technical Resource Panel and currently serves on the AICPA Tax Reform Resource Task Force. He is also a member of the editorial board of Thomson Reuters *Focus* publication and serves as chairperson of the Nemours Planned Giving Committee.

Jordon is a licensed CPA in Delaware and Pennsylvania and is a member of the Pennsylvania Institute of CPAs, Delaware Society of CPAs and the AICPA Tax Section. He also holds the designation of Accredited Estate Planner and has been recognized as a 5-Star Wealth Manager by Philadelphia Magazine and Delaware Today.

Mr. Rosen is a frequently sought out speaker both locally and nationally on tax planning and related issues and has published more than 100 articles. He has been a frequent television and radio guest and a past host of *Money Talk* on 1450-WILM. He received his undergraduate degree in Accounting from Temple University (January 1979) and his Master’s degree in Taxation from Widener University (1981).

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AGENDA: 5:30 p.m. Complimentary Cocktails / 6:30 p.m. Presentation & Dinner

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