HOGE-FENTON

TAX REDUCTION STRATEGIES FOR FOUNDERS & WEALTHY FAMILIES - OCT. 17, 2023

Peninsula Webinar Series

Presented by BNY Mellon & Hoge Fenton

TAX REDUCTION STRATEGIES

for Founders and Wealthy Families

October 17, 2023 8:00 - 9:00 a.m. PT



Join Tim Maximoff, Attorney at Hoge Fenton, Karen Sugihara, Regional Fiduciary Manager for BNY Mellon Wealth Management, and former Assemblymember Hon. Catharine B. Baker for the first of our

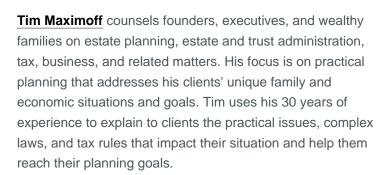
three-part Peninsula Webinar Series, "Tax Reduction Strategies for Founders and Wealthy Families," on October 17, 2023, from 8:00 - 9:00 a.m. PT.

Company founders, business owners, and wealthy families face challenges in reducing taxes and passing on their wealth effectively. Our knowledgeable panelists will guide you on some of the available techniques and will discuss the following:

- Founders and owners considering a significant liquidity event in the future
- Founders and owners anticipating a business exit
- Generational wealth transfer

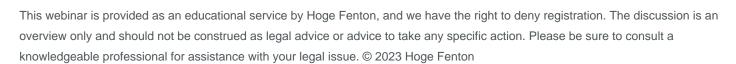
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Karen Sugihara is the Regional Fiduciary Manager for BNY Mellon Wealth Management, leading the fiduciary business throughout California and Washington. She brings three decades of trust and estate experience in private banking, fintech, legal research, and law practice to the role. Karen leads a team of fiduciary specialists in San Francisco, Menlo Park, Century City, Newport Beach, and Seattle. She also manages the delivery and fiduciary oversight of advisory-based services to clients.

Hon. Catharine B. Baker will be moderating our discussion Catharine is a former California State Assemblymember who represented the 16th Assembly District from 2014 through 2018. She is a Commissioner with the California Fair Political Practices Commission, which administers and enforces California's landmark government ethics laws. Catharine is Special Counsel at Hoge Fenton, where she advises businesses and non-profits and practices election law.









Primary Contact

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Related Attorneys

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