

# 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

[REGISTER HERE](#)

---

## Meet Our Speakers



**Tim Maximoff** counsels founders, executives, and wealthy families on estate planning, estate and trust administration, tax, business, and related matters. His focus is on practical planning that addresses his clients' unique family and economic situations and goals. Tim uses his 30 years of experience to explain to clients the practical issues, complex laws, and tax rules that impact their situation and help them reach their planning goals.



**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.

This webinar is provided as an educational service by Hoge Fenton, and we have the right to deny registration. The discussion is an overview only and should not be construed as legal advice or advice to take any specific action. Please be sure to consult a knowledgeable professional for assistance with your legal issue. © 2023 Hoge Fenton

## Primary Contact

- J. Timothy Maximoff

## Related Attorneys

- J. Timothy Maximoff