

Unedited transcript of

## **Welcome and Introduction**

from **Estate Planning: MCLE BasicsPlus!®**

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### **Speaker(s)**

Katherine M. Sheehan, J.D., AEP, Crestwood Advisors, Boston

>>: Good morning, everyone. Welcome back to day 2. I had promised yesterday that today, we were going to talk about transfer tax, and you're going to have to wait until tomorrow because I read the agenda wrong. So hold your horses until tomorrow for transfer tax, but we are going to talk about tax this morning. We're going to talk about some future income tax. Before I introduce our first speakers for today, just a couple of housekeeping items. Number one, I think I forgot to introduce myself yesterday. I've done this program so long that I know think that I assume everyone knows who I am and why I'm doing this. So I am Katie Sheehan and I'm a future advisor with Boston private. I've been with Boston private for about three and a half years, but prior to that, I practiced across the states so all of these topics are near and dear to my heart. They certainly were while I was practicing and they are now in my advisory capacity. A couple of other things. Everyone has provided I think their contact information. I know there's so much information to get through, the presenters do their very best to put a massive amount of information into a very small time period. So I will go through and I will answer those questions that you type into the chat. If for some reason, we don't get to your questions or you think of something else, please feel free to reach out to me or the presenters and we'll be happy to get to your questions. And now, without further ado, I'm going to introduce my first two speakers today, who are also repeat performers for me and I have been doing this program for ten years, and I think both of them have been doing this for all of those ten years with me. And they still like me. [Laughs] So thank you, guys! So we have Richelle Maguire, who is a CPA with Goldman and James Tierney, with my former law partner. So guys, I don't know if you

want to give a little bit more background on yourselves and then we can jump right in to fiduciary income tax.

>>: So good morning everyone, I'm Richelle Maguire. I'm a tax partner, focusing on the private client area. My practice is predominantly high net worth individuals, fiduciaries, trusts and estates so I do a lot of work in this area and have had the pleasure of working with Jim and Katie for all these years on this presentation. I'm happy to be here today.

>>: Thanks. My name is Jim Tierney. We do high-end estate planning, all different types from basic to very high net worth individuals. We do have a tax practice as well so that's why I'm speaking on this subject. So we set up estate plans. We'll do trust tax returns, estate tax returns and handle everything that comes under that umbrella. But I've been working with Richelle and Katie for many years and it's always been a pleasure. So thank you. I'm looking forward to it.