

Tiffany Teel House, CAP® , CEPA, FCEP

Wyoming State Bar – 2024 Annual Meeting & Judicial Conference – September 10-13, 2024

Southeast Wyoming Estate Planning Council – Sessions listed below are open to attend.

Date: 9/11/2024

Time: 1:30 – 2:30 PM and 2:45 – 3:45 PM

Location: Little America Hotel & Resort – Cheyenne, WY

Session #1 – 1:30 – 2:30 PM

The Art of Tax-Savvy Business Sales: A Strategic Approach

Description: Discover the art of asset preservation in business sales with our comprehensive guide to tax-advantaged strategies. We'll delve into the intricacies of Donor Advised Funds, Supporting Organizations, Charitable Trusts, Pooled Income Funds, and more, showcasing how these instruments can shield your proceeds from hefty tax bites. Learn about the transformative potential of Charitable Stock Bailouts, Opportunity Zones, Deferred Sales Trusts, ESOPs, and the often-overlooked Qualified Small Business Stock Exclusions.

Why relinquish 20-40% of sale proceeds to the IRS when there are strategies to employ that are deeply rooted in the tax code? Join us to empower yourself with the knowledge to assist your business owner clients to keep more of their hard earned proceeds.

Learning Objectives:

- Be empowered to talk to business owners about tax-advantaged sale options.
- Understand how various planning tools apply to different corporate structures.
- Feel confident as an advisory team member when clients are ready to sell their business

Session #2 – 2:45 – 3:45 PM

Smart Planning with Real Estate Assets

Description: In this essential workshop for professional advisors, we delve into the transformative power of real estate within the American wealth landscape. With 43% of the nation's wealth tied up in property, the strategic planning of real estate assets is not just an option—it's a necessity. This session will equip you with a comprehensive toolkit of tax-advantaged strategies designed to optimize your clients' real estate portfolios.

We'll explore innovative solutions for selling or gifting real estate that go beyond traditional methods, offering lifetime income opportunities, estate planning advantages, and significant tax savings. Our interactive format encourages the exchange of complex scenarios, such as cash back gifts of real estate, retained life estates, and the handling of encumbered assets.

Come prepared to engage with your peers, share challenging client cases, and leave with actionable insights that will empower you to guide your clients through the intricacies of real estate diversification with confidence and expertise.

Tiffany's Biography:



Tiffany House is a tax, estate, and charitable strategist. She works as a consultant with families and helps guide them through intricate situations including transitioning a business, planning philanthropy, values-based estate planning, and tax concerns. She also enjoys working with nonprofit organizations to elevate their gift planning programs.

Tiffany is very active in the community. She serves on many boards and enjoys lifelong learning. She is very passionate about educating advisors, donors, and clients about tax-advantaged strategies and enjoys speaking across the country.