GREATER NEW JERSEY ESTATE PLANNING COUNCIL, INC.

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www.gnjepc.org

Real Estate Income Tax and Estate Planning Strategies That Estate Planners Need to Know and Evaluate

Date: Wednesday, May 13, 2026
Time: 11:30 am – 1:30 pm
Location: Bacari Grill (800 Ridgewood Rd; Township of Washington, NJ 07676)
Speaker: Matthew E. Rappaport, Esq., LL.M.; Vice Managing Partner, and Chair of the Taxation and Private Client Groups; Falcon Rappaport & Berkman LLP (Rockville Center, NY and New York, NY)

LIVE EVENT ONLY!

Many clients own real estate. It can be a major asset – and sometimes it can present various obstacles or complexities – in a client's world. Tax considerations often drive decisions in the real estate world. As professionals, we look to reduce, even eliminate, the income tax, gift tax, and estate tax exposure for our clients. We also look at asset protection, and many other aspects of our client's world. We use a variety of planning strategies and techniques – however, real estate can be a very complex asset to deal with. In addition, real estate owners are particularly sensitive to the impact taxes may have on their world.

The Greater New Jersey Estate Planning Council is very excited to have none other than, nationally known attorney, Matthew E. Rappaport, of Falcon Rappaport & Berkman LLP. Matthew is the Vice-Managing Partner, and Chair of the firm's Taxation and Private Client Groups. He concentrates his practice on Taxation as it relates to Real Estate, Closely Held Businesses, Private Equity Funds, Family Offices and Trusts & Estates. Matthew is well known for his work on complex deals involving advanced tax considerations and transactions, such as Section 1031 exchanges, Qualified Opportunity Zone planning, freeze partnerships and partnership planning, sophisticated planning and transactions, private equity mergers and acquisitions, and Qualified Small Business Stock planning.

This very exciting – LIVE event (no virtual/online option) – will be about how we as professional advisors can expand our awareness and knowledge when working with clients who own real estate. Matthew will not only share with us how to identify various planning opportunities but also educate us on a wide range of planning techniques and strategies – going well beyond the traditional 1031 exchange. Matthew is going to talk about strategies such as REIT's/UPREIT's, DST's, Freeze Partnerships, and more! If you are an estate and/or income tax planning professional and you have clients who own real estate – then you have to attend this event!

Matthew is an expert's expert and presented on the national stage at the **Notre Dame Tax & Estate Planning Institute**, covering cutting-edge transfer and income tax strategies, the **American Bar Association (ABA), Section of Taxation**, the **National Conference of CPA Practitioners (NCCPAP)**, and more. He is one of the most highly sought after estate and income tax planning professionals in the country. This is an opportunity to hear, live, from one of the leading experts in the country on top planning strategies and techniques!

This is going to be a DON'T MISS EVENT! Register ASAP for this presentation on real estate, income and estate tax strategies that every estate planning professional needs to know!

REGISTRATION INSTRUCTIONS:

Please register at: https://www.eventbrite.com/e/real-estate-income-tax-and-estate-planning-strategies-tickets-1988398869545?aff=oddtdtcreator to reserve your ticket and to let us know your CE requirements.

NOTE: If you are a former Member but did not renew for the 2025-2026 year, you will need to purchase a Non-Renewed Member ticket.

Applications are pending for 2.0 continuing education credits for CFP, NJ CLE, and NJ CPE. If you wish to receive CE credits, you must provide the necessary license information, and you must attend the full course.