



# GREATER NEW JERSEY ESTATE PLANNING COUNCIL, INC.

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## The Best Income, Estate, And Charitable Planning Ideas, Strategies, And Techniques For 2026 And Beyond!

**Date: Thursday, July 23, 2026**

**Time: 11:30 am – 2:00 pm**

**Location: Bacari Grill (800 Ridgewood Rd; Township of Washington, NJ 07676)**

**Speaker: Jeremiah ("Jere") W. Doyle IV, Esq.; National Director, Estate and Tax Planning,  
for BNY (BNY/Mellon) Wealth**

### LIVE EVENT ONLY!

It's that time of year and we hope everyone is enjoying their summer! And with that, the **Greater New Jersey Estate Planning Council's Annual Special Estate And Tax Planning Event is here! We have never been more excited than for this year's event and it will be bigger and better than ever!**

It is now Summer 2026, the mid-term elections are this November... January 1, 2027, is right around the corner, and for the first time we now have some "permanency"... or do we? Will we start to hear about "Sunsets" again, further extensions, something new, radical? We have gone through some unprecedented times in the world of estate and tax planning – and we've seen and heard it all before – reform, sunset, claw-backs, reduced exemptions, extensions, some carry-over basis, potential attacks on grantor trusts, GRAT's, and note sales, and more! Is all of that gone now? So what do we do now? Today? And moving forward? How do we plan for our clients?

Well, it is now time to hear from the best of the best! **The GNJEPC is extremely excited and very proud to have none other than Jeremiah W. Doyle IV, Esq., National Director of Estate and Tax Planning, for BNY/Mellon. "Jere" will be live and in-person for this very special event.** Jere Doyle is an ACTEC member and is one of the leading tax and estate planning experts in the United States. He is nationally known, and has lectured/presented at Heckerling, Notre Dame, and numerous other national events and forums. Jere has been with BNY/Mellon since 1981 where he is the National Director and works with the firm's high net worth individuals and families throughout the country.

Jere is one of the most knowledgeable tax, trust, and estate attorneys in the industry, and more importantly, he does "planning" for clients every single day! He has a reputation for taking complex and sophisticated strategies and techniques, and making them very simple and easy to understand – so that clients take action and implement! Jere is known throughout our industry for his brilliant mind, creative thinking and problem-solving, and for developing and implementing unique solutions to complex income and estate tax problems. He is the expert's expert as he is called upon by professionals throughout the country. Now,

Jere is coming to NJ and we are going to hear his best thinking, best planning ideas, strategies and techniques that he is using today!

This is going to be a DON'T MISS event! You will hear the best of the best, from one of the best. You will leave this event with great ideas you will never hear elsewhere, knowing how you can advise and plan for your clients. Come hear the best ideas, strategies, and techniques for tax, trust, and estate planning, from one of the best in the country! DO NOT MISS THIS EVENT! SEATING IS LIMITED!

**REGISTRATION INSTRUCTIONS:**

Please register at: <https://www.eventbrite.com/e/the-best-strategies-and-techniques-for-2026-and-beyond-tickets-1992097664741?aff=oddtcreator> 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.*