

# HAVE CHANGES IN THE LAW SABOTAGED YOUR ESTATE PLAN?

*Do You Have Plan? Does it protect from estate tax AND income tax?*

## “HAVE CHANGES IN THE LAW MADE YOUR PLAN OBSOLETE?”

### You Will Learn:

- The 1 simple step you can take *without a lawyer* to cut estate & income taxes AND grow your estate.
  - But you need to do it this year.
- What *critical* document is **missing** from almost every estate plan!
  - This can save your heirs from *losing everything!*
- How to “**Divorce-Proof**” the inheritance you leave your loved ones.
- Why the Massachusetts Estate Tax is now optional - but only if you plan correctly!
- Why snowbirds who own a 2nd home in MA are subject to the MA Estate Tax - even if their state of residence is elsewhere!
- Who should **not** use Irrevocable Medicaid (Nursing Home Protection) Income Only Trusts:
  - Why most of our clients say “*NO THANKS!*”
  - If you are stuck with one, how you may be able to get out.
- The “**right**” way and the “**wrong**” way to leave your IRA, 401(k), 403 (b) or other qualified plan (most people choose the wrong way — *don't* be one of *them!*)
- How without proper planning the SECURE Act and SECURE Act 2.0 impact your estate plan by shrinking the wealth you can leave - and what you can do about it.
- How Massachusetts residents and anyone else who owns real estate or a business in Massachusetts will be impacted by the TWO taxes on Millionaires!
- About **LLCs** - the newest must-have component of an Estate Plan:
- **New Trust Techniques** that may save you & your family thousands of dollars under the new tax law!

The Law Offices of Boyd & Boyd, P.C. have specialized exclusively in the area of Estate Planning for over 30 years and has offices conveniently located nearby. Join the many families who have turned to our family to set up their Living Trust or upgrade their existing one!

**Find Out Whether Your Current Living Trust Plan (or the one you'll get)  
Passes Our Critical 10 Point Test!**

**Join us for a free seminar unlike any you'll ever attend!**

*Find a Date & Time That Works for You:*

<b>Dan'l Webster Inn</b> 149 Main Street Sandwich, MA 02563 <b>May 16 or June 20</b> 10:00 a.m. - 12:00 p.m.	<b>Wequassett Resort</b> 2173 Route 28 Harwich, MA 02645 <b>May 23 or June 13</b> 10:00 a.m. - 12:00 p.m.	<b>Courtyard by Marriott</b> 707 Iyannough Road Barnstable, MA 02601 <b>May 24 or June 7</b> 10:00 a.m. - 12:00 p.m.	<b>Sea Crest Beach Hotel</b> 350 Quaker Road North Falmouth, MA 02556 <b>June 6 or June 21</b> 10:00 a.m. - 12:00 p.m.
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***Don't Wait!! Reserve Seats for You & Your Friends Today!!***

***Please RSVP Today! Seating is very limited and fills quickly!***

**To reserve seats for you and your guests call (855) 308-5620 or register online at: [www.youRSVP.com](http://www.youRSVP.com) and enter: JUFYUR**



*Your Presenters*

# F. KEATS BOYD, III & WHITNEY TASHJIAN



Attorney F. Keats Boyd, III, is a graduate of the College of the Holy Cross. After serving in the U.S. Air Force as a Captain, he received his Doctorate, Cum Laude, from Suffolk University Law School. He has more than 30 years of experience as an estate planning attorney. His clients are from across the state, as well as up and down the eastern seaboard and from as far west as Arizona, California, Hawaii and Washington state. Mr. Boyd is admitted to the Bar of Massachusetts, the U.S. Tax Court, the U.S. District Court of Massachusetts, the First Circuit Court of Appeals, and the Supreme Court of the United States. He is also a member of the Massachusetts Bar Association, Barnstable Bar Association, National Academy of Elder Law Attorneys, Inc. (NAELA<sup>TM</sup>), and InterActive Legal and MBA Probate Law Section, and the Estate Planning Council of Cape Cod. Attorney Boyd is a well-known and well-respected lecturer. He regularly conducts educational seminars for continuing education credit and for the general public. Comments from past attendees include: “The best I have attended;” “Very enlightening,” and “Excellent presentation – learned a lot!”



Attorney Whitney N. Tashjian is a graduate of The College of the Holy Cross and Suffolk University Law School. She is admitted to the Bar of Massachusetts, the District of Columbia (D.C.), the United States District Court of Massachusetts and the United States Tax Court. Prior to joining Boyd & Boyd, P. C. in 2019, Whitney served as Counsel for the Law Office of Lindsey M. Straus, a general practice firm based on Cape Cod. She was a Securities Litigation Paralegal for five years at Mintz Levin in Boston, where she was responsible for filing securities class action and SEC cases on behalf of institutional investors. She also interned with the Law Offices of Vinca Jarrett & Associates, a small Boston-based entertainment firm, culminating in an opportunity to represent the firm at the 2013 Cannes Film Festival. Whitney was a competitive figure skater with the United States Figure Skating Association and grew up spending her summers on the Cape with her family. She is also a member of InterActive Legal, the Barnstable Bar Association, and the Estate Planning Council of Cape Cod.