WELLS FARGO

The Private Bank

Please join us for an informational conference call.

The Impacts of Politics on Policies, Portfolios, and Planning

An election year alone presents challenges and opportunities for investors and wealth planning due to the correlation between taxes and politics and the potential implications on the markets. The Tax Cuts and Jobs Act that became effective January 1, 2018 roughly doubled the 2017 exemption value for the estate tax however, the longevity of this exemption is unknown. It sunsets December 31, 2025 and could possibly be repealed by a future Congress and President before then. While many prepare for their final life events by carefully constructing estate plans, changes in administrations can result in uncertainty and delayed planning due to potential tax law reform.

Join this discussion for an update on the markets, tax and policy proposals, and what to consider.

Hosted by:
The Santa Barbara Estate Planning Council

Moderated by:
Scott Hansen
Regional Managing Director
Wells Fargo Private Bank

Featured Speakers:
Marc Doss
Regional Chief Investment Officer
Wells Fargo Private Bank

Chris Pegg
Senior Director of Planning
Wells Fargo Private Bank

Tuesday, October 27, 2020

4:45 - 6:00 p.m. PST

Zoom Video Webinar

The link and login will be sent the prior Tuesday of the event (October 20th) in the reminder message.

4:45PM - 5:00PM *Important updates for SBEPC members*
5:00PM - 5:45PM *Speaker event*
5:45PM - 6:00PM *Q&A session*

Featured Speakers

Marc Doss, CFA®, CFP®
Managing Director, Regional Chief Investment Officer
Wells Fargo Private Bank

Mr. Doss is the regional chief investment officer and a managing director for Wells Fargo Private Bank in the Western Region. Marc leads a team of investment professionals who deliver comprehensive, custom, diversified portfolio management for clients of The Private Bank. In his role, he serves as the investment thought leader in the region by providing insight and interpretation of the economy and financial markets at client events and through written commentary. Marc serves on the Wealth Investment Policy and Fiduciary Oversight Committee.

Chris Pegg
Senior Director of Planning
Wells Fargo Private Bank

Chris is the senior director of planning for the Western region of Wells Fargo Private Bank. Mr. Pegg leads a team of 30 wealth planning managers, strategists and planners who develop and implement custom wealth plans for clients based on a thorough understanding of each client's personal values and vision for their legacy. Chris speaks and writes frequently on matters relating to tax law and wealth planning and has been quoted on multiple occasions in the New York Times and other national publications.

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