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The 2019 SECURE Act: Implications for Retirement and Estate Planning

Wednesday, February 26, 2020

PANELISTS:

SUSAN N. DUPUIS, JD, MBA, Partner, Marcum LLP

Dupuis is a tax principal in Marcum's New Haven and Boston offices. She is a member of the Marcum Family Office Service Group as well as the Family Wealth Services and Trusts & Estates Practice groups. Dupuis has more than 20 years of experience assisting private clients, trustees and closely-held business owners with their income, fiduciary and estate and gift tax planning and compliance needs. She provides in-depth guidance on issues facing families with substantial wealth including philanthropic endeavors, alternative investments and succession planning. Dupuis is an attorney admitted to practice in the Commonwealth of Massachusetts. She received a Master of Business Administration and has attained the Accredited Estate Planner (AEP) designation, and is a member of the Boston Estate Planning Council, the Massachusetts Society of CPAs and the Professional Advisors Council at The Boston Foundation. She is an alumna of two of the "Big Four" accounting firms and had her own firm prior to joining Marcum in 2012.

INGI-MAI LOORAND, Attorney, Reid & Riege, P.C. Attorneys

Loorand represents clients in the Estate Planning & Settlement practice group at Reid & Riege, P.C., focusing in the areas of estate planning, probate, trust administration and estate settlement, providing sensitive and attentive service to clients of all ages and professions in identifying estate planning needs. She creates individually-tailored estate plans designed for multiple purposes: lifetime asset management; health care and financial decision-making in the event of incapacity; lifetime gift and asset distributions; protection of assets for blended families; management and control of assets for young, spendthrift or special-needs beneficiaries; guardianship of minors; charitable giving; use of federal and state estate, gift and generation skipping transfer tax exemptions; and probate avoidance. She also counsels executors, trustees and beneficiaries in estate and trust administration and in all probate court matters. Loorand received her J.D., magna cum laude, from Quinnipiac University School of Law, her M.A. from Wesleyan University and her B.A., summa cum laude, from State University of New York at Stony Brook.

PETER J. PURCELL, CFP®, ChFC®, CLU®, Wealth Management Advisor, TIAA

Purcell is a Certified Financial Planner Practitioner and has been in the financial services industry for over 30 years. He started his career in 1986 working for Aetna in the Property & Casualty Insurance business within the Personal Financial Securities Division. From 1995 to 2006 he was a financial advisor at ING Financial Advisors, LLC, providing advice to individual clients in the 403(b) and 457 markets. For the past 14 years, Purcell has held the position of Wealth Management Advisor at TIAA-CREF Investment Advisory Services. He works with high net worth clients, holistically assisting them with their complex financial planning needs. He focuses on solutions for his clients' investment, insurance, long-term care, estate planning, wealth transfer, philanthropic and retirement income planning needs.

MODERATOR:

SHARON CAPPETTA, CAP®

Director of Development, The Community Foundation *for* Greater New Haven

Cappetta, a Chartered Advisor in Philanthropy,® works with donors and their advisors to create charitable giving solutions to help donors achieve their philanthropic goals. A lifelong development professional, Cappetta came to The Foundation in 2003 after having worked at the Saint Raphael Foundation, the UConn Foundation and several national health agencies.