

Lippes Mathias Wexler Friedman LLP Partners Thomas J. Keable and Elizabeth L. Perry to Present to Members of CPA Ontario

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BUFFALO, NY – Thomas J. Keable and Elizabeth L. Perry, partners with Lippes Mathias Wexler Friedman LLP, will speak at a dinner of the Niagara District of Chartered Professional Accountants of Ontario on February 16 in St. Catharines, Ontario. Their presentation focuses on “Estate Planning and Cross Border Planning for Canadians Owning U.S. Assets.”

Mr. Keable and Ms. Perry will discuss U.S./Canadian estate tax issues, probate avoidance, planning considerations for U.S. citizens and non-U.S. citizen spouses, and appropriate entity structures for investing in U.S. real estate.

As the firm’s cross-border practice group leader, Mr. Keable focuses his practice on assisting Canadian businesses, lenders and individuals with U.S. legal matters, including the purchase and sale of businesses, representation of lenders and borrowers in structuring financings and negotiation and drafting of loan and security agreements; the structuring of entities; and the preparation of agreements for a wide variety of business transactions and situations.

Ms. Perry is the leader of the firm’s trusts and estates practice group and works with clients to create estate plans tailored to meet personal goals and objectives with a focus on income, estate, gift and generation-skipping transfer tax issues. Additionally she focuses on succession planning for family and closely-held businesses, elder law issues, trust and estate litigation and estate administration.