

**Questions for “Women & Wealth Panel Discussion: Estate, Tax, Philanthropic,
and Elder Care Planning Considerations”**

Minutes 1-3: Introduction

Minutes 3-6: Single women having children. Planning considerations due to usage of artificial reproductive technology. Deductability of medical expenses.

Minutes 6-9: Planning implications of women living longer than men.

Minutes 9-12: Unique challenges that elderly female clients face.

Minutes 12-15: Long-term-care planning and being a caregiver.

Minutes 15-20: Medicaid updates.

Minutes 20-23: Conversations on philanthropy with female clients.

Minutes 23-27: The importance of discussing philanthropy even with clients who are not charitably inclined.

Minutes 27-32: Estate planning for female clients who are recently divorced.

Minutes 32-35: Taxes, marriage, and planning opportunities.

Minutes 35-38: Women and Taxes: Practical considerations

Minutes 38-41: Planning when there are children from a previous union.

Minutes: 41-44: Exploring a values-based philanthropic conversation over taxes with clients.

Minutes 47-50: Tax-efficient ways to leave a charitable legacy

Minutes 50-57: Covid related tax issues such as working from home or moving/ working from another state?

Minutes 57-60: Conclusion