



**December 7, 2021**

# **Your Moderator Report**

# Event Information

Registered: 63 | # Attended: 35 | % Attendance Rate: 56% | # Q&A Questions Asked: 8



## Questions

### **Dick Plambeck - fightingil63@aol.com**

- Should one spouse die before the other, the single tax rate will go up significantly over that for a married couple filing jointly. That should also be considered when thinking about a Roth Conversion, right?
- Please address the question of what the current Ways and Means Committee recommendations are with respect to which individuals will not be able to do Roth conversions in 2022 and who will not be able to make those conversions in 2032
- I don't see that I received the webinar outline that you referred to. Can you please send it to me (again)?
- Can you take the \$500,000 tax credit for selling a home more than once on different homes?
- Does the current Ways & Means proposal still attack Grantor Trusts and especially Irrevocable Life Insurance Trusts.?

### **Ann - garvey.ann@gmail.com**

- What do you "skim" the interest money into?

### **Suzann- suzvan@aol.com**

- Needs the PDF sent to her.

### **Gary - garyfig1@gmail.com**

- Pension tax information



## Webinar Reports

<https://docs.google.com/spreadsheets/d/144UL5x18-7yUTAY2m5kSjBLCfcYrBzkc0LgJVNSlibg/edit?usp=sharing>



## Registrants

- Mary
- Dave
- Chinny
- Linda
- Barb
- Catherine
- Robin
- Jerome
- Rebecca
- Steven
- Bob
- ben
- RaTest4
- Marion
- Anna
- Harriet
- Ruth
- Dolores
- Sharad
- Firoozeh
- Diana
- Sharon
- Jim
- Anne
- Brenda
- William
- nan
- Phyllis
- Moshe
- Gary
- Darlene
- Suzann
- Gregg
- BJ
- Carol
- Barry
- Leonard
- Linda
- Cindy
- Trish
- Julee
- Jack
- Rebecca
- nancy
- Ann
- John
- Mona
- Bob
- Irwin
- Vincent
- Peter
- Jerry
- David
- Vincent
- Nanine
- Kenneth
- Stephen
- Dick
- DAN
- Robert
- Natalia
- Jack
- Ramon



## Attendees

1. Mary
2. Dave
3. Chinny
4. Linda
5. Barb
6. Catherine
7. Robin
8. Jerome
9. Rebecca
10. Steven
11. Bob
12. ben
13. RaTest4
14. Marion
15. Anna
16. Harriet
17. Ruth
18. Dolores
19. Sharad
20. Firoozeh
21. Diana
22. Sharon
23. Jim
24. Anne
25. Brenda
26. William
27. nan
28. Phyllis
29. Moshe
30. Gary
31. Darlene
32. Suzann
33. Gregg
34. BJ
35. Carol