

# CONTINUING LEGAL EDUCATION

THE BAR ASSOCIATION OF SAN FRANCISCO



The Estate Planning, Probate and Trust Section of the Barristers Club presents

## Introduction to 1031 Exchanges and Qualified Opportunity Zones

**Tuesday**  
**September 28, 2021**

Program: 12:00 - 1:15 p.m.

### Speakers

#### **Christopher J. Clarkson, CFA**

Director, AllianceBernstein

#### **Jason Nossiter**

Principal, AllianceBernstein

#### **Ron Ricard, CES**

Vice President, Regional Account Manager, IPX 1031

#### **Richard Shu**

Principal, Barulich Dugoni & Suttman Law Group

Real estate investors can defer paying capital gains tax by conducting a tax deferred exchange. While that is still the case, Opportunity Zone investments may serve as a viable alternative for investors.

### Topics

- Rules applicable for a 1031 Exchange
- Pros and Cons of a 1031 Exchange
- Rules applicable for a Qualified Opportunity Zone (QOZ)
- Pros and Cons of a QOZ
- Examples and discussions of both types of transactions

### MCLE: 1 Hour

To receive MCLE credit, you must sign in during the designated MCLE registration period. This activity is approved for Minimum Continuing Legal Education credit by the State Bar of California. BASF is a certified provider.

Provider #103

**In-Person Location** (Due to the social distancing rules currently in place, this event is currently planned as an online-only presentation. Please check the CLE calendar for any changes.)

### Cost

\$35 Section Members

\$45 BASF Members, Government &

Nonprofit Attorneys

\$65 Others

Free for BASF Student Members

All prices increase \$10 on the day of the program.

**Event Code:** B211257

### BASF Members:

Be sure to log in to get your discounts!

Refunds will be given up to 48 hours in advance, less a \$10 handling fee.

### Special Requests:

People with disabilities should contact BASF regarding reasonable accommodations.

Section Co-Chairs: Kit Driscoll, Coblenz Patch Duffy Bass, Melanie Emmons, Kato Feder Suzuki & Richard Shu, Barulich Dugoni & Suttman Law Group Inc.

**Event Code: B211257 Register online: [www.sfbar.org/calendar](http://www.sfbar.org/calendar)**

**CLE Webcast:** [www.sfbar.org/calendar](http://www.sfbar.org/calendar)



Live



Recorded  
Available Oct 8