

From: "Morris, Paul V" <[REDACTED]>

To: "jeffrey E." <jeevacation@gmail.com>

Subject: FW: Webinar Replay: A Look at Opportunity Zones Webinar

Date: Mon, 26 Nov 2018 14:04:17 +0000

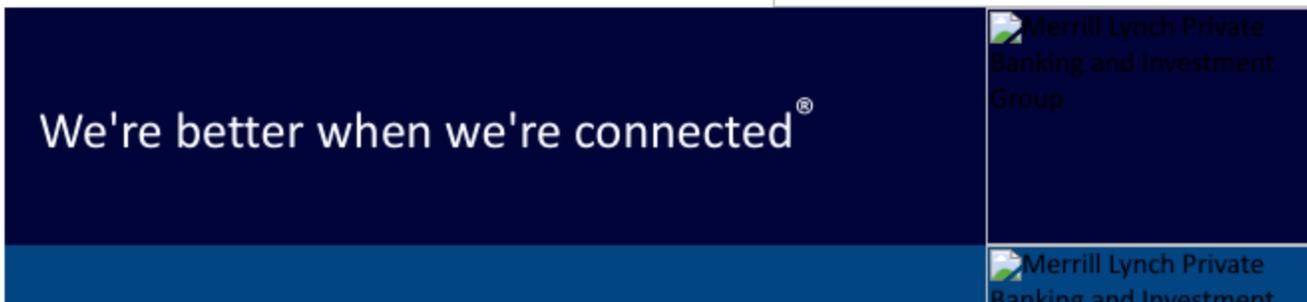
Inline-Images: image001.jpg; image002.gif; image003.gif; image004.png; image005.png

Pretty good presentation, client replay info down below

From: GWIM Chief Investment Office

Sent: Wednesday, November 21, 2018 11:10 AM

Subject: Webinar Replay: A Look at Opportunity Zones Webinar



REPLAY: Webinar from November 15: "A Look at Qualified Opportunity Zones"

To: Private Banking and Investment Group employees

In our webinar on November 15 our speakers discussed a new tax provision¹ in the Tax Cuts and Jobs Act and how it may open the door around possibilities regarding capital gains.

A [replay of the webinar](#) is now available. To invite clients, please use the invitation email on eCommunications Center in the "Client Call" category.

This discussion featured:

- Niladri Mukherjee, Head of CIO Portfolio Strategy for the Chief Investment Office within Global Wealth and Investment Management, Private Banking and Investment Group

Webinar Registration

[Access the webinar online](#)

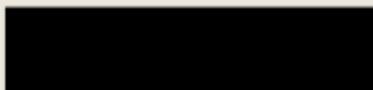
The replay will be available until December 13.

Dial-in information

Employees



Clients



- Mitch Drossman, Head of National Wealth Planning Strategies, Chief Investment Office with Global Wealth and Investment Management supporting U.S. Trust
- Jackie VanderBrug, Managing Director and Head of Sustainable & Impact Investment Strategy for the Chief Investment Office within Global Wealth and Investment Management
- Ariel M. Beliak, Senior Vice President of Community Development Banking for Bank of America Merrill Lynch

To learn more about qualified opportunity zones, please read this article, [Deferring Capital Gains: Qualified Opportunity Zones](#).

¹ This new provision is contained at new Sections 1400Z-1 and 1400Z-2 of the Internal Revenue Code.

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Qualified Opportunity investing, is a relatively new and evolving investment opportunity in an Opportunity Zone program, which is highly speculative and involves a high degree of risk, as well as limited liquidity. An investor could lose all or a substantial amount of their investment.

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