



**Syida Long**  
Managing Director Goldman Sachs  
&  
**Christopher Karachale**  
Partner Hanson Bridgett LLP

## The Future of Qualified Small Business Stock: A Review of Current Practices and Consideration of the Unanswered Questions

Please join us for our next **in-person** meeting on **November 16th** at the **Commonwealth Club in San Francisco** at 5:00 pm for a social hour with hors d'oeuvres and cocktails, followed by our featured speakers, Syida Long and Christopher Karachale at 6:00 pm.

The presentation will provide a brief overview of QSBS rules, including 1202 exclusion and 1045 rollover options. The presentation will then focus on specific QSBS issues for estate planners, including trust stacking options and alternative options to maximize the 1202 exclusion. The presentation will conclude with a review of potential pitfalls for advisors with clients hoping to maximize the QSBS exclusion.

**Syida Long** advises clients on innovative and customized strategies to combine their family and philanthropic goals with income, estate, gift and generation-skipping tax planning considerations. She joined Goldman Sachs in 2007. Previously, she worked at Andersen Tax. She is a frequent speaker at tax conferences, estate planning councils and universities, including the Heckerling Institute on Estate Planning. Syida earned a BA in Economics, Phi Beta Kappa, with an emphasis in Accounting from the University of California at Berkeley. She is a CPA.

**Christopher Karachale** advises individuals and businesses on a range of tax planning and tax controversy matters. Christopher regularly works with entrepreneurs and start-up companies and is a nationally recognized expert on qualified small business stock. Christopher received his B.A. from Middlebury College, his M.A. from Stanford University, his J.D. from the University of San Francisco, and an LL.M. from New York University.

**Join us on Wednesday, November 16, 2022**

**5:00 PM – 6:00 PM Social Networking/hors d'oeuvres and cocktails**

**6:00 PM – 7:00 PM Meeting**

**Commonwealth Club – 110 The Embarcadero in San Francisco**

**NOTE DIFFERENT LOCATION ABOVE!**

\$85 Pre-registered Members - \$105 Pre-registered Guests

*At the door – Registrations still needed - \$90 members and \$110 guests*

**Reservation needed by November 14, 2022**

[Register Here](#)

MCLE: This activity is approved for MCLE credit of one hour by the State Bar of California & CFP®.

Excused Absence: Members can request an excused absence by sending an email (info@sfepc.org) to the Council Office prior to the meeting.