News Release
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The Punxsutawney Area Community Foundation, Inc. will host a workshop for attorneys and estate planners on Tuesday, October 29th beginning at 9:00 AM. The workshop will be held at The Inn at Punxsutawney (formerly the Cobblestone Inn) and will conclude by noon. Light refreshments will be served.

The workshop will address a number of tax and estate issues with a focus on planning for charitable giving through tax and estate planning. Topics addressed during the workshop will include Federal Estate, Gift, and Inheritance Taxes; the impact of the expiration of the Tax Cuts and Jobs Act in 2026; and common gift giving strategies including planning for gifts of cash and appreciated assets, using donor advised funds to manage taxes and meet charitable objectives, and planning for retirement assets (Secure Act - loss of the “stretch IRA”, Charitable IRA rollovers, Charitable Trusts).

Adopting effective strategies to meet charitable estate planning goals requires positioning assets to effectively maneuver around income estate, gift, and inheritance taxes. Though the laws are extraordinarily complex, they present a number of opportunities to enhance the value of charitable gifts. The workshop will explore charitable giving strategies allowing for tax efficient estate planning.

The workshop will be led by Dr. Kathleen Stewart, Vice President and Senior Financial Planner in Janney, Montgomery, Scott's Wealth Planning Department. She supports Janney's Western regional offices and is based out of Pittsburgh, Pennsylvania.

In that role, she provides comprehensive solutions designed to effectively address complex issues to help high net worth clients, business owners, corporate executives, and others meet their goals and objectives. She assists Janney's Financial Advisors by providing subject matter expertise to analyze a wide variety of issues including estate, trust, and wealth transfer planning, asset protection, retirement, income tax, and charitable planning strategies.

Dr. Stewart has extensive experience in estate, fiduciary, and individual income tax planning for high net worth clients.

Prior to joining Janney, she spent over 20 years serving as a senior wealth planning strategist at large national wealth management institutions including The Bank of New York Mellon and PNC Private Bank. She began her financial counselling career with The Ayco Company LP (now part of Goldman Sachs). She received her Accredited Investment Fiduciary (AIF®) designation and served as fiduciary research specialist for Fi360 where she developed fiduciary educational programs for AIF® designees, CFPs, and other financial advisors.

Dr. Stewart received her Juris Doctor from Duquesne University's School of Law and Bachelor of Science in Business Administration also from Duquesne University. She is certified as an Accredited Investment Fiduciary (AIF®). She has been a frequent speaker at seminars on various financial and estate planning topics and has published several articles for Kiplinger's Wealth Creation column and has been quoted in Barron's, Think Advisor, and other industry publications.

Dr. Stewart is a member of the Estate Planning Council of Pittsburgh and the Allegheny County Bar Association.

The workshop is open to any attorney or financial planner at no cost. Those who wish to attend should register with the Punxsutawney Area Community Foundation, Inc. by calling 814-938-2493 and leaving a message or e-mailing info@pxycf.org.