

Family Office Exchange, Tamarind Learning Focus on Top Concerns Facing Family Office Clients in New Podcasts

WASHINGTON, DISTRICT OF COLUMBIA, UNITED STATES, July 10, 2024 /EINPresswire.com/ -- Pat Soldano, President, Policy and Taxation Group, Talks with Both Family Office-based Organizations About Capitol Hill Policies Affecting Family Wealth, Businesses

Issues facing clients of family offices, family businesses, and successful individuals are the focus of two new podcasts, one from the Family Office Exchange and the other from Tamarind Learning.

Both podcasts feature discussions with Pat Soldano, Founder and President of the Policy and Taxation Group. Soldano is also President of Family Enterprise USA. Both are bipartisan family business advocacy groups based here.

The Family Office Exchange (FOX) podcast is hosted by FOX CEO, Peter Moustakerski, and highlights key policy concerns facing family office clients and family businesses during a contentious and polarized Congress.

FOX, based in Chicago, is an industry advocate and a source of education and training for family members, office staff, and their advisors, and offers a platform for sharing best practices for preserving family values and family wealth.

During the podcast Soldano details key findings from the recently released Family Enterprise USA Family Business Survey 2024. Findings include family business concerns about personal income taxes, new wealth tax proposals, and national debt worries.

The full podcast can be heard here:



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**Voice for Family Offices
& Successful Individuals**

<https://www.familyoffice.com/podcasts/giving-family-enterprises-a-voice-in-washington-dc>

Tamarind Experts Series

The Tamarind Learning podcast, hosted by Kirby Rosplock, PhD, is part of the group's Tamarind Learning Series on family office trends, and where it speaks with experts on issues facing family offices catering to high-net-worth individuals.

The podcast topic, "Empowering Family Businesses: Insights About Policy and Tax," opens with a discussion on the number one issue facing successful individuals: high personal income taxes.

During the Tamarind conversation, Rosplock asks Soldano about what new findings came out the national family business survey.

"The number one new concern," Soldano says, "is the proposed 'wealth tax' being kicked around on Capitol Hill. A year ago, it wasn't even on the radar."

This proposed new tax, Soldano details, may likely force family businesses to pay an annual tax on the value of their businesses.

"I think it's a justifiable concern because we know seventy percent of the voters believe in a wealth tax," Soldano says. "They don't know what that means, they don't know how it would be executed, and they don't really understand the policy," she says. "Most family businesses probably don't consider themselves wealthy, but they are considered wealthy not only by members of Congress, but by voters. And if there's a wealth tax in this country, it's going to apply to them."

Tamarind Learning, based in Boca Raton, Fla., bridges the education, communication, and awareness gaps that exist among families around family wealth. Tamarind Learning offers online learning environment that provides education on wealth stewardship in the form of multi-course programs with professional designation.

To hear the full Tamarind Learning podcast go to:

<https://tamarindlearning.com/podcasts/Empowering%20Family%20Buisness%20/>

In both podcasts, when asked about solutions for the many policy issues affecting family office clients and successful individuals, Soldano offered some advice:

"People believe that they can stay out of politics and it won't affect their lives. Unfortunately, politics affects all our lives, and I believe all tax policy, as well as other policies on Capitol Hill, is all led by politics," she says. "It's not led by common sense or what makes good policy. It's why we're very excited that the new Congressional Family Business Caucus is bipartisan, like our organizations, and provides a real voice for our concerns. Everyone needs to get engaged with

this group, so Washington policy makers hear our voice.”

About Policy and Taxation Group

Policy and Taxation Group (PATG) is the Voice of Family Offices and Successful Individuals in Washington, DC, focused exclusively on the Tax and Economic Issues that impact them. Since 1995, PATG has been the leading advocacy group working to reduce and eliminate estate, gift, and GST taxes while blocking increased income and capital gains taxes, the creation of a wealth tax, and other hostile tax policies that punish hard work and success. PATG is a 501(c)(4) organization comprised of families directly or indirectly impacted by these harmful taxes and regulations. For more information or to support, see www.policyandtaxationgroup.com.

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