

Givner & Kaye
Thursday
Seminar Series
August — October

Our MCLE & CE accredited series is held in our office on the **1st & 3rd Thursday** of each month from **2:30pm to 4:00pm**. The series are a collaborative forum for professionals—attorneys, CPAs, financial advisors—to share *uncommon* knowledge, insights and practical “know-how.”

TO REGISTER for the webinar or to attend the presentation please contact **Desiree Kisselburg** at **310-207-5963** or **seminars@givnerkaye.com**.

- Parking will be validated.
- Refreshments will be served.
- Continuing Education Credit: one hour for tax topics.

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AUGUST 4TH: NO SEMINAR ON THIS DAY.

AUGUST 18TH: PITFALLS IN INVESTING IN REAL ESTATE PRIVATE OFFERINGS.

Joel Kantor, Esq., Kantor Law & Associates



Like the old cliché, investing in real estate private offerings is a little like getting married: it is so easy to get into and very difficult to get out of. Joel Kantor will describe many of the pitfalls and will suggest several solutions. He will discuss various pre-investment due diligence techniques; will review specific examples from various Offering Memoranda and LLC Operating Agreements; and will suggest various approaches to render the agreements more favorable to investors, including some possible, tax advantageous approaches. Joel has been a real estate law practitioner for nearly 40 years.

SEPTEMBER 1ST: NO SEMINAR ON THIS DAY.

SEPTEMBER 15TH: BUY-SELL AGREEMENTS FROM A VALUATOR'S PERSPECTIVE.

Adam McArthur, CFA, ASA, Strategic Valuation Group, LLC



Almost every professional service provider is impacted by a buy-sell agreement, either for their own practice or when dealing with their clients. These agreements are often drafted without the parties fully understanding the ramifications and uncertainty associated with what will happen when the buy-sell agreement is triggered. As an experienced business valuation expert, Adam McArthur, will provide insight as to what really happens when a buy-sell agreement is triggered. Adam will discuss how the terms of a buy-sell agreement lead to disputes over the value of the underlying business and how to avoid these disputes by having a better understanding of how they impact value.

About Givner & Kaye



When CPAs, financial planners and estate planning lawyers have clients with difficult wealth planning situations, they want Givner & Kaye to be part of the planning team. We collaborate with other professionals - attorneys, financial planners, accountants, stockbrokers, and insurance professionals - to serve the specialized planning needs of individual families.

We have maintained the same close working relationship with important referral sources for three decades, with newer ones joining each decade. That continuity and respect is important in providing a stable, intimate and friendly atmosphere for our clients.

Contact Bruce Givner or Owen Kaye for more information about Givner & Kaye's services at:
310-207-8008 or
Bruce@GivnerKaye.com ;
Owen@GivnerKaye.com



OCTOBER 6TH: YEAR END INCOME TAX PLANNING. WHAT CAN YOU DO AT THIS LATE DATE?

Bruce Givner, Esq., Givner & Kaye

The calendar indicates that there are now 86 days left in the year. However, with weekends and holidays it is more like 50. Will income tax rates (State and/or Federal) go up in 2011? Should we take the deductions in 2011? Or defer them into 2012? If we decide to take the deductions in 2011, what deductions are *safely* available at this late date? A defined benefit pension plan? Property and casualty insurance through a captive? Various charitable structures? Oil and gas drilling syndicates? Is it better to just pay the tax and not worry about planning? Bring your questions and concerns.



OCTOBER 20TH: HOW TO HEDGE YOUR ASSETS FOR LONG-TERM CARE NEEDS.

Barry Boscoe, CFP, Brighton Advisory Group

93% of the long term buying public chooses to self insure as opposed to protecting themselves with the traditional non-guaranteed annual premium approach to long term care protection. Barry will explore the alternative solution; Asset Based long term care hedge using repositioned assets. This approach has opened the minds of individuals reluctant to explore the use of long term care insurance and has helped protect thousands of individuals of all ages, including up to age 99, guard against the loss of their assets due to a long term care need. Barry will discuss the various sources of funds which could be repositioned including, current life insurance policies no longer needed, annuities and the ability to eradicate the basis taxation issue, qualified plan money and cash to name just a few.

A SNEAK PEEK AT NOVEMBER & DECEMBER SEMINARS

- Nov. 3rd:** **IRA And Retirement Plan Beneficiary Designations: Problems and Opportunities.** Bruce Givner, Esq.
- Nov. 17th:** **Limited Liability Companies.** Jeffrey L. Davidson, Esq.
- Dec. 1st:** **Asset Protection Planning: The *Advanced* Course.** Bruce Givner, Esq.
- Dec. 15th:** **Tax Planning For The Sale of Your Business.** Bruce Givner, Esq.