June - July 2011 "Seminar Series"

2:30 p.m. - 4:00 p.m.

LAW OFFICES OF GIVNER & KAYE
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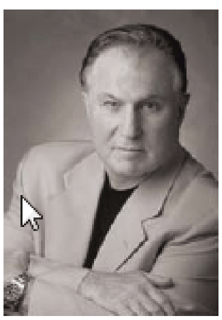
June 2nd: **Pit Falls In Investing In Real Estate Private Offerings.** ***Joel Kantor, Esq., Kantor Law & Associates***

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.

June 16th: **Large Pension Deductions For Closely Held Businesses.** ***Stan Weisleder, Actuaries Unlimited, Inc. and Bruce Givner, Esq.***



Taxpayers are often told they will not be able to get a large deduction or the employee cost will be "too large." The facts are important. Perhaps: (i) there are businesses that are not members of a controlled or affiliated group; (ii) there are family members providing services who are not currently or sufficiently compensated; (iii) the rank and file can be covered in a PSP; or (iv) some of the cost of the highly compensated employees is not a true "additional cost." We will discuss: (1) how under the new law, overall limits are higher and you can have 3 plans; (2) sample maximum contributions at various ages; and (3) how insurance can increase overall contributions.

July 7th: **Estate Planning For Smaller Estates.** ***Bruce Givner, Esq.***

A "smaller estate" is one not driven by tax planning. Other issues loom large. Selecting fiduciaries to minimize disputes. Selecting distribution formats, e.g., to encourage beneficiaries to become self-sufficient? To prevent the beneficiaries from losing assets to creditors, e.g., a future ex-spouse? Healthcare directives, competency issues and long-term care. IRA and pension beneficiary designations. Beneficiary designations and borrowing from or a sale of insurance policies. Special needs trusts, charitable bequests, pet trusts and business assets targeted to one child. Bring your questions and concerns.

July 21st: **Stockbroker, Investment Advisor and Financial Planner Misconduct.** ***Presented by John D. Singer, Esq., Singer Deutsch LLP (New York & Los Angeles).***

What happens when a broker engages in investment-related misconduct such as fraud, unauthorized trading, including churning, and stock manipulation? Individual investors are often faced with situations where the broker fails to diversify the portfolio; misrepresents or omits facts about investments; buys and sells securities without first receiving permission from the client; recommends investments that are not suitable for a person's circumstances, including age, family situation and assets; engages in boiler room tactics (high-pressure sales practices); and variable annuities fraud. John is highly experienced and successful in representing both plaintiffs and defendants, in court and in arbitration. Bring your questions and concerns.

Givner & Kaye Seminar Series, the 1st and 3rd Thursday of each month, 2:30 p.m. to 4:00 p.m. (or by **Webinar**), are a collaborative forum for professionals— attorneys, CPAs, financial advisors — to share *uncommon* knowledge, insights and practical "know-how". They are also an opportunity to network with others and enjoy their company.

Continuing Education Credit: 1 hour for tax topics.

A Sneak Peek at August through October

Aug. 4th: **LLCs.** ***Presented by Jeffrey L. Davidson, Esq.***

Aug. 18th: **Your Own Private Trust Company: How It Is Possible And Why It Is Useful For Your Family.** ***Bruce Givner, Esq. and Owen Kaye, Esq.***

Sep. 1st: **No Seminar on this day.**

Sep. 15th: **Buy-Sell Agreements from a Valuator's Perspective. Presented by Adam McArthur, CFA, ASA, Strategic Valuation Group, LLC.**

Oct. 6th: **Year End Income Tax Planning. What Can You Do At This Late Date?** ***Presented by Bruce Givner, Esq.***

Oct. 20th: **How to Hedge Your Assets For Long-Term Care Needs.** ***Presented by Barry Boscoe, CFP, Brighton Advisory Group***

RSVP: Desiree Kisselburg at 310-207-5963 or seminars@givnerkaye.com.
(Call for Webinar details.)
Parking validated.
Refreshments will be served.