LAW OFFICES OF
GIVNER & KAYE
A PROFESSIONAL CORPORATION

April – May 2011 "Seminar Series"

12100 Wilshire Blvd., Suite 445
Los Angeles, CA 90025
310-207-5963
www.givnerkaye.com

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

Apr. 21st: **Family Lifetime Maintenance Programs.** ***Bruce Givner, Esq. and Owen Kaye, Esq.***

The estate plan – or estate tax plan - has been put into effect. Now it is one year later. Or 5 years later. Who has checked to make sure that the parents still like the successor trustees? That they still like the distribution provisions? That the house is still in the QPRT after a refinance? That the parents are only taking their *pro rata* share of FLP distributions? Each plan, each structure, must be renewed and reviewed. Learn how this step in the process – maintenance – works, how it provides comfort to the family (and their advisors) and can be customized for every family's situation.

May 5th: **Retirement Risk Management.** ***Adam Hammer, CRPC, Vice President, Senior Financial Advisor of Merrill Lynch.***

The parents have engaged in estate planning, estate tax planning, asset protection planning, and they have set up and heavily funded a qualified plan. Is that enough? Adam Hammer, a compelling public speaker and successful financial advisor, will address important retirement income issues. For example, how do you take into account longevity risk? Inflation risk? Sequence of return risk? He will also discuss how an annuity may be an appropriate solution to fund a retirement income gap.

May 19th: **Is Now A Good Time To Sell Your Business? Are There Other Ways For Business Owners To Get Liquidity?** ***David Bonrouhi, Managing Director, Calabasas Capital, LLC.***

David Bonrouhi, an experienced and successful investment banker, will discuss the current state of the mergers and acquisition market and recent trends in private equity and lending. There are many alternative ways to get liquidity out of a business other than an outright sale. There are a number factors business owners must consider when evaluating these alternatives, and they should get their business and personal financial houses in order so that they are best prepared to execute their chosen strategy.

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 June through September

Jun. 2nd: **Business Succession Planning: Independent Board & Trustees, Phantom Stock Plans, Etc.** ***Presented by Bruce Givner, Esq.***

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

July 7th: **Estate Planning For Smaller Estates.** ***Presented by Bruce Givner, Esq. and Owen Kaye, Esq.***

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

Aug. 4th: **Perils For Individuals Serving As Trustees.** ***Presented by Bruce Givner, 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: **Asset Protection Planning For Businesses.** ***Presented by Bruce Givner, Esq. and Owen Kaye, Esq.***

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

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

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