

Givner & Kaye
Thursday
Seminar Series
JULY — AUGUST

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.

CONTACT US

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JULY 7TH: ESTATE PLANNING FOR SMALLER ESTATES

Bruce Givner, Esq.



A "smaller estate" is one not driven by tax planning - other issues loom large, such as:

- ◆ Selecting fiduciaries to minimize disputes.
- ◆ Selecting distribution formats, e.g., to encourage beneficiaries to become self-sufficient.
- ◆ Preventing 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.

JULY 21ST: STOCKBROKER, INVESTMENT ADVISOR & FINANCIAL PLANNER MISCONDUCT

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.

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.

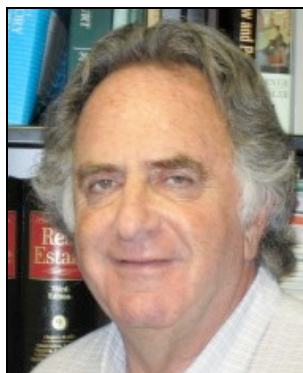
Contact **Bruce Givner** or **Owen Kaye** for more information about Givner & Kaye's services at:
310-207-8008 or
Bruce@GivnerKaye.com ;
Owen@GivnerKaye.com



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.

A SNEAK PEEK AT SEPTEMBER — NOVEMBER SEMINARS

Sep. 1st: No Seminar On This Day.

Sep. 15th: Buy-Sell Agreements from a Valuator's Perspective.

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

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

Oct. 20th: How to Hedge Your Assets For Long-Term Care Needs.

Barry Boscoe, CFP, Brighton Advisory Group.

Nov. 3rd: IRA and Retirement Plan Beneficiary Designations: Problems and Opportunities. Bruce Givner, Esq.

Nov. 17th: Limited Liability Companies. Jeffrey L. Davidson, Esq.