LAW OFFICES OF
GIVNER & KAYE
A PROFESSIONAL CORPORATION

Givner & Kaye Thursday Seminar Series

September & 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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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 all professional service providers are impacted by a buy-sell agreement, either for their own practices or when dealing with their clients. These agreements are often drafted without the parties fully understanding 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.

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

Bruce Givner, Esq., Givner & Kaye

The calendar indicates 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 take the deductions in 2011, which ones 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.

- continued -

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

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October 20th: How To Hedge Your Assets For Long-Term Care Needs.

Barry Boscoe, CFP, Brighton Advisory Group

93% of the public chooses to self insure their long-term care needs as opposed to protecting themselves with the traditional non-guaranteed annual premium approach. Barry will discuss the alternative: 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 review 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, 2011 — January, 2012 Seminars

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

Nov. 17th: **Protecting The Fiduciary in Real Property Sales.**
Kelly deLAAT & Rachelle Rosten, Coldwell Banker

Dec. 1st: **Asset Protection Planning: The *Advanced* Course.**
Bruce Givner, Esq.

Dec. 15th: **Tax Planning For The Sale of Your Business.**
Bruce Givner, Esq.

Jan. 5th: **No Seminar On This Day.**

Jan. 19th: **Everything You Always Wanted to Know About Family Trusts, But Were Afraid to Ask.**
Bruce Givner, Esq.