

Givner & Kaye
Thursday
Seminar Series

May thru July, 2013

Our MCLE & CE accredited series is held in our office, and by webinar, 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 a webinar, or to attend a presentation, please call **Desiree Skelly** at

310-207-8008 or e-mail us: **brucegivner@givnerkaye.com**.

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

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APRIL 18TH—NO SEMINAR DUE TO BRUCE’S TRIP TO CHINA

MAY 2ND: IS NOW A GOOD TIME TO SELL YOUR BUSINESS?

David Bonrouhi

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 of 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

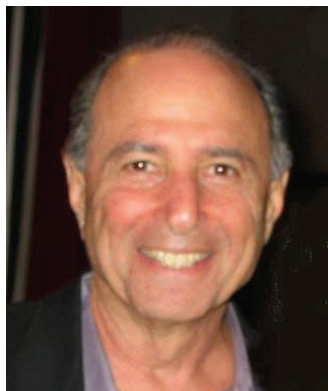
- ◆ Current state of the M&A and private equity markets
- ◆ Trends in lending
- ◆ Liquidity alternative
- ◆ Key considerations for Owners
- ◆ Getting prepared

Bring your questions and concerns.

MAY 16TH: Tax Free Retirement

Steve Soffer

Platinum Pension & Insurance Services



Is a Tax Free, Risk Free Retirement Possible? Steve Soffer will discuss:

- ◆ When we look into the future and see the possibility of all taxes rising including substantial increases in income and estate taxes on both the Federal and State levels, does it still make sense to defer taxes?
- ◆ Can one avoid taxation on future retirement income outside of a Roth IRA?
- ◆ The “4% Rule” is the rule which states that for withdrawal of income in retirement no more than 4% of the principle should be withdrawn annually. Does it still hold true?
- ◆ What are the major banks doing with the money in your checking account to make money while avoiding market risk?
- ◆ Is it possible to get guaranteed returns of 3% with an upside as high as 13.5% annually with no risk of market losses?

Bring your questions and concerns.

About Givner & Kaye



JUNE 6TH: CROSSING BORDERS: A PRIMER ON INTERNATIONAL TAXATION FOR INDIVIDUALS

Bruce Givner, Esq.

Givner & Kaye, A Professional Corporation



The French/German/Korean/Chinese individual plans to take up U.S. residence due to the high taxes in the individual's native country; due to the fact that the individual's children live in the U.S.; due to the business opportunities in the U.S.; due to political/financial instability in the individual's native country. What tax planning should take place before the individual takes up residence in the U.S.? Or the same French/German/Korean/Chinese individual plans to buy real estate/invest in a business in the U.S. How should that investment be made? The U.S. individual plans to give up U.S. citizenship to minimize ongoing U.S. taxes and the later U.S. estate tax. What planning should take place before the individual expatriates? What is a foreign trust and why does it matter? These and other interesting issues will be addressed.

Bring your questions and concerns.

A SNEAK PEEK AT OUR UPCOMING SEMINARS

June 20th: Safer, Bigger, More Tax Efficient Retirement

Barry Boscoe, CFP

Brighton Advisory Group

July 4th: NO SEMINAR—HAPPY 4TH OF JULY!

July 18th: DPOAs, Including Healthcare Directives And Living Wills, Everything You Wanted To Know

Bruce Givner, Esq. and Owen Kaye, Esq.

Givner & Kaye, A Professional Corporation

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