

Thursday Insights for April 2020

2:30 p.m. – 4:00 p.m.

April 2, 2020 – Adding Exit Planning to Your Practice – Choose, Develop, Implement, and Maintain; *Presented by Shelley Lightfoot, CEPA and Brooke Norman, Vice President, Exit Planning Institute*

Business owners are searching for answers on how to protect what they have and plan for a successful business exit or transition. This course is a dialogue on professional collaboration and the type of practice your referral sources and clients experience – your practice as seen through the eyes of others. Join Shelley and Brooke for the 30-thousand-foot version of steps and tools you need to position your exit planning practice in the forefront of your community and become a “referable” source for others.

April 9, 2020 – Buy/Sell Agreement Disasters; *Presented by Freddy Garmo, Esq. and Joseph Matuk, Esq.*

Entity purchase, cross purchase, trusted cross purchase, wait and see, valuation methodologies, key person, partial redemption, reverse, and all of the other seemingly silly options and considerations that owners and advisors gloss over when setting up a buy/sell agreement create ticking time bombs and eventual disasters. Learn from Freddy and Joseph the myriad of options and lessons learned from litigation at the back end.

April 16, 2020 – Pre-Empted for the Fox Rothschild Fiduciary Attorney Summit

Don't miss the important fiduciary attorney educational and recreational event of the year hosted by Peter Myers, Esq. and Sean Kenney, Esq. of Fox Rothschild LLP. The 2020 FAS will focus on trust and estate litigation, including the ins and outs of court trials.

Visit www.FoxFiduciaryAttorneySummit.com for more information!

April 23, 2020 – Your Client's B Trust May be a Disaster; *Presented by Steve Mancini, Esq., and Danny Wexler, Esq.*

The most common estate plans have been: 1) I love you “A” trust, 2) A/B trusts, and 3) A/B/C trusts. If both spouses are still alive, the “B” trust is probably not needed for estate tax purposes and will cause a lack of step up in basis on the 2nd passing. If there is only one surviving spouse now, the results may be the same. Learn how to solve the problem in both situations.

April 30, 2020 – Pre-empted for Strazzeri Mancini LLP and Southern California Institute Team Building Event

Every 5th Thursday, the Strazzeri Mancini LLP and Southern California Institute Teams close the offices early to enjoy an afternoon of fun team building activities.

