



BUYNAK LAW CORPORATION



CPA ♦ LAW SOCIETY

OF SANTA BARBARA COUNTY



BARTLETT,
PRINGLE &
WOLF, LLP
CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS



Presents

“Exit Planning for Business Owners”

with
Ross F. Hoffman

President/CEO of Hoffman and Associates Financial and Estate Advisors, Inc.

Thursday, March 23rd, 2006
12:00-1:30PM
La Cumbre Country Club

The Forster Group
at Smith Barney



Ross F. Hoffman is President and Chief Executive Officer of Hoffman & Associates, Financial & Estate Advisors, Inc., a Family Wealth Counseling firm specializing in the counseling, analysis, design and implementation of Master Family Wealth plans with over 30 years of professional experience. The planning includes such areas as business exit planning and succession, charitable alternatives, retirement planning, investment and tax strategies as well as the creative and effective use of life insurance liquidity planning techniques.

Ross works closely with the Center of Fiduciary Studies based at the University of Pittsburgh. Ross is an Accredited Investment Fiduciary (AIF) and coaches fiduciaries on prudent investing as it pertains to trust planning, charitable endowments, 401(k) & pension plans.

Presentation

"Exit Planning for Business Owners"

Exit Strategy Topics Will Include: **They All Need To Exit:** At some point in time, your business client will have to leave his or her business – either voluntarily or otherwise. **They All Want Top Dollar:** A correct value must be determined for your business client to accomplish personal, financial, income, and estate planning goals. **They All Need A Successor:** The business will be transferred to family, a co-owner, key employees, an outside third-party, or undergo a costly liquidation.

Reservations

The cost of the luncheon is \$35 for non-members and \$25 for members. Please email your reservations and lunch selection to cpalawsb@bpw.com. RSVP by **January 19th**. Please **make checks payable to CPA/Law Society and remit upon luncheon reservation. Payments can be mailed to: Tina Benavides 1123 Chapala Street, Santa Barbara, CA 93101.**

LUNCH CHOICES

Chinese Chicken Salad
Chopped garden greens with freshly cooked chicken pieces, pea pods, bean sprouts and mandarin oranges. Served with a special dressing.

Chicken Piccata
Breast of chicken with lemon and caper sauce, served with angel hair pasta and vegetable of the day.

Vegetarian Pasta
Angel hair pasta with sun dried tomatoes, fresh vegetables tossed in a light olive oil and fresh basil.

Lunch includes your choice of ice tea, coffee and dessert.

Continuing Education

CPA/Attorneys: 1.0 Hr CPE/MCLE.

This activity has been approved for Minimum Continuing Legal Credit by the State Bar in the amount of 1.0 hour. VCBA certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the state bar of California governing MCLE. Additionally, this organization follows the CE requirements, specified in the California Board of Accountancy Regulations.