



CPA • LAW SOCIETY OF VENTURA COUNTY



THE EAST VENTURA COUNTY CHAPTER

PRESENTS:

“ASSET PROTECTION PLANNING”

Presented by
JACOB STEIN, ESQ.

JUNE 23, 2006, FRIDAY
12:00 - 1:30 p.m.

Westlake Village Inn

31943 Agoura Road, Westlake Village, CA 91361
818.889.0230/800.535.9978
www.westlakevillageinn.com

**SEATING IS
LIMITED
RSVP ONLY**

CONTINUING EDUCATION

CPAs/Attorneys:
1.0 Hr CPE/MCLE
This activity has been approved for Minimum Continuing Legal Education credit by the State Bar of California 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.

Jacob Stein is a partner with Boldra, Klueger & Stein, LLP, in Woodland Hills focusing in the areas of domestic and international income tax planning, structuring of business transactions, estate planning and asset protection. Mr. Stein is a certified Tax Law Specialist and a frequent lecturer to various CPA and attorney groups on topics ranging from taxation to asset protection.

PRESENTATION

This comprehensive program will cover all aspects of asset protection planning and is designed for CPAs and attorneys who would like to gain an understanding of asset protection and risk minimization focusing on business and tax neutrality. The goal of asset protection planning is to structure asset and business ownership to minimize the exposure of such assets or businesses to lawsuits and creditors. To that end, this program will explore available planning techniques that will accomplish that goal in an effective and ethical manner, while maintaining business and tax neutrality.

The seminar will cover the underlying substantive law and will focus on the practical aspects of asset protection planning, including planning with community property, business entities and domestic and foreign trusts. The seminar will also cover how to plan for specific clients: business owners, doctors, real estate investors, spouses, high-risk professionals and other high-net worth individuals. Course materials will serve as an exhaustive reference source for many of your planning needs and will outline and diagram the discussed planning technique and structures.

LUNCH CHOICES

Balsamic Chopped Salad:
Mixed Greens, Jicama, Tomato, Cucumber, Garbanzo Beans, Red Onion, Garlic Croutons & Diced Chicken in the WLVI Inn's House Balsamic Salad

Black Angus French Dip Sandwich:
Tender Roasted, Shaved Roast Angus Beef Served with Fire-Roasted Onion au Jus & Seasoned Frites

Vegetarian Alternative:
House Choice

(PLEASE SELECT ONE)

RESERVATIONS

Price Includes Lunch, Coffee/Tea, Dessert and 1 hour of MCLE/CPE credit. The cost is \$35 for members of the CPA/Law Society and \$45 for non-members. Please make checks payable to "CPA/Law Society of Ventura County" and mail to Hemming Morse, Inc., 2815 Townsgate Road, Suite 110, Westlake Village, CA 91361. **Please make your reservations and lunch selection** (Balsamic Chopped Salad, Black Angus French Dip Sandwich, or Vegetarian Alternative) by email to cpalaw@hemming.com by June 19, 2006. Please call Ruth Feldon at 805.381.0500 if you have any questions.