

Tuesday, January 24, 2012

Professional Education Seminar 3 credits\*

## STRATEGIC PLANNING:

Valuation, Transfer and Distribution

Lecture and case study format

- Gift Tax and Gift Tax Audits
- Valuation and Discounts
- Asset Preservation & Wealth Transfer Techniques
- Planning for future generations

Presented by:

Community Foundation of Orange and Sullivan's Professional Advisors Council,  
with the assistance of:



& ORANGE COUNTY TRUST COMPANY

Location: Mr. Willy's Restaurant, 3595 Route 42, Monticello, NY

Registration: 3:30 pm Seminar: 4:00 pm — 7:00 pm Light refreshments

Seminar Fees: \$30 \$25 for Members of NYSSCPA

Credits:  
Attorneys receive 3 CLE credits\*  
CPAs receive 3 CPE credits  
CFPs receive 3 CFP credits

Limited seating. **MUST RESERVE BY JANUARY 20, 2012** by contacting the  
Community Foundation: 845-769-9393 E-mail: [admin@cfoc-ny.org](mailto:admin@cfoc-ny.org) [www.cfoc-ny.org](http://www.cfoc-ny.org)

Presenters:

**Gift Tax and Gift Tax Audits:**

**Annette Ludwig, Esq., Estate and Gift Tax; Internal Revenue Service**

Valuation and Discounts:

Gregory R. Langer, *President, Valuation Consultants*; and  
William Quackenbush, *ASA CBA, Advent Valuation*

Asset Preservation and Wealth Transfer Techniques:

Bonnie J. Orr, CPA, *Judelson, Giordano & Siegel, CPA, P.C.*  
Eddie Haughney, CIMA®, *Morgan Stanley Smith Barney*  
Steven L. Tarshis, JD, LLM *Tarshis, Catania, Liberth,*  
*Mahon & Milligram, PLLC*

**Facilitator:** Maureen Crush, Esq., *Rider, Weiner & Frankel, P.C.*

\*Credits are pending. This program is transitional and appropriate for experienced and newly admitted attorneys. The Women's Bar Association of the State of New York has been certified by the New York State Continuing Education Board as an accredited provider of continuing legal education in the State of New York. Full and partial scholarships based on need are available. For guidelines and information, please contact Maureen Crush at 845.790.9122. All requests are confidential.



COMMUNITY  
FOUNDATION  
of  
ORANGE and SULLIVAN

Co-sponsors:

Sullivan County Bar Association, Mid-Hudson Chapter of the New York State Society of Certified Public Accountants, Women's Bar Association of Orange & Sullivan Counties, a Chapter of the Women's Bar Association of the State of New York, Hudson Valley Financial Professionals



### SULLIVAN COUNTY BAR ASSOCIATION MEETING:

**THIS SEMINAR ON JANUARY 24, 2012 IS FOLLOWED BY A MEETING OF THE SULLIVAN COUNTY BAR ASSOCIATION AT MR. WILLY'S RESTAURANT. ALL SEMINAR PARTICIPANTS ARE INVITED TO STAY FOR DINNER.\***

\*If you are interested in attending the SCBA Dinner Meeting, you must contact **Danielle Jose, at 791-7800 or [daniellejose@verizon.net](mailto:daniellejose@verizon.net) to make a reservation. RSVP by January 18, 2012.**

Dinner begins at 7:30 p.m. Cash bar.

Dinner choices:

- NY Strip
- Salmon Dijon
- Chicken Portofino (with a banana liqueur finish)
- Pasta Primavera (vegetarian)

\*Cost for dinner: \$30.00 (includes coffee, tea, dessert, tax & tip)