

Who Should Attend:

This seminar is organized by the Jewish Federation of Cleveland's Professional Advisory Council and is designed to assist attorneys, accountants, trust officers, financial and insurance advisors, and non-profit professionals.



Reneé Chelm, Board Chair

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Helping Your Clients Live Well Today & Plan for Tomorrow

42ND

Tuesday, June 3, 2014

CHARITABLE TAX SEMINAR

Professional Advisory Council



42ND

Charitable Tax Seminar

**Tuesday,
June 3, 2014**

Jewish Federation of
Cleveland

Mandel Building
25701 Science Park Drive
Cleveland, Ohio 44122

For More Information:

- E-mail: philplan@jcfccle.org
- Call: 216.593.2860

7:30 a.m.

Registration & Continental Breakfast (kosher dietary laws observed)

8:00 a.m.

Program

12:30 - 1:15 p.m.

Lunch and Guest Speaker (qualifies for continuing education credit)

Cost: \$75*

Early bird registration by May 19 is \$75. Fee thereafter is \$100.

There is a \$25 cancellation fee after May 28. **SPACE IS LIMITED!**

Cost includes registration fee, breakfast and lunch.

Program Chair: Gary A. Zwick, Esq.

*Summer and first year associates are invited to attend as our guests.

To Register:

- Online: www.jewishcleveland.org
- By mail: complete bottom portion and send to Jewish Federation of Cleveland
Mandel Building
25701 Science Park Drive, Cleveland, Ohio 44122
Attn: Charitable Tax Seminar

Accreditation:

- The Charitable Tax Seminar includes 4.00 hours of presentations.
- The Federation is registered with the Accountancy Board of Ohio.
 - The Federation has applied for CLE credit to the Supreme Court of Ohio Commission on Continuing Legal Education, for CE credit to the Certified Financial Planner Board of Standards and for CE credit to the Ohio Department of Insurance.

Gary A. Zwick, Esq., Partner, Walter Haverfield LLP
Chair, 42nd Charitable Tax Seminar

Matthew F. Kadish, Esq. Partner, Kadish, Hinkel & Weibel
Chair, Professional Advisory Council

Program

How Will Extended Care Effect Your Client's Philanthropic Goals? Concepts to Enhance Charitable Giving

Larry L. Rothstein, CLU, AEP, Senior Advisor, Cornerstone Consulting Group, LLC
David J. Seiger, JD, LTCP, Vice President of Long Term-Care, Berson-Sokol Agency, Inc.

Captive Insurance Companies: How do they work and who should use them?

Dale A. Kaprosy, Senior Vice President, Oswald Companies
Gregory A. Lopez CFP®, Senior Producer Life - Wealth, Oswald Companies

Financial Markets: Poised to Turn Down or Steady as She Goes? Ten Important Indicators

Ronald P. Joelson, Executive Vice President and Chief Investment Officer, Northwestern Mutual

Once Upon a Lifetime: Estate Planning for Singles

Fran Mitchell Schaul, Esq., Senior Counsel, Calfee Halter & Griswold LLP

Charitable Contributions of Partial Interests in Real Estate

Frederick N. Widen, Esq., Partner, Ulmer & Berne LLP

Charitable Tax Savings: Creating, Measuring and Spending

Jennifer Barnes, CPA, MT, Director of Tax, Pease & Associates, Inc.

Luncheon - Tax Reform and Charitable Giving: Insights from Inside the Beltway

William C. Daroff, Senior Vice President for Public Policy & Director of the Washington, D.C. Office, Jewish Federations of North America



42nd Charitable Tax Seminar

Yes, I will attend the Charitable Tax Seminar (\$75 by May 19 or \$100 thereafter. Not tax deductible.) **Please respond by Monday, May 19, 2014.**

Yes, I will attend the complimentary luncheon.

No, I will not attend the complimentary luncheon.

Enclosed is a check payable to the Jewish Federation of Cleveland

MC Visa Amex Discover

Credit Card # _____ Exp. Date _____

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Address _____

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Professional Discipline _____

Presentation Materials

All presentation materials will be made available for download before the Seminar. A printed presentation booklet is available for a \$10 additional fee. **Booklets will be provided only to attendees who order in advance.**

Please provide me with a presentation booklet for an additional \$10.

Summer and first year associates are invited to attend as our guests.

Amount Enclosed
\$ _____

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