

Wednesday, November 2, 2011

Professional Education Seminar 3 credits\*

## STRATEGIC PLANNING:

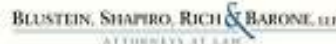
Valuation, Transfer and Distribution

*Lecture and case study format*

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



### Sponsors:



Don Badgley, Field Director- Northwestern Mutual

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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



**Community Foundation of Orange and Sullivan**

30 Scott's Corners Drive, Suite 202  
Montgomery, NY 12549

**STRATEGIC PLANNING: Valuation, Transfer and Distribution**

**Wednesday, November 2, 2011**

**Event Location:** The Community Foundation located at the Orange County Chamber of Commerce Business Center, 30 Scott's Corners Drive, Montgomery, New York 12549

**Registration:** 4:30 pm      **Seminar:** 5:00 pm — 8:00 pm

**Fees:** \$45 Non-members \$40 Members of NYSSCPA

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

Limited seating. **Please reserve by October 19, 2011** 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)  
A light supper will be included.

**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.  
Edie Haughney, CIMA<sup>®</sup>; Morgan Stanley Smith Barney  
Steven L. Tarshis, JD, LL.M. Taxation; 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.

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