

*Continuing Education for
Attorneys, CPAs & Advisors:*

**Legal & Tax Framework for
Alternative Investment Strategies in Retirement &
Wealth Transfer Planning**

**Thursday, December 10, 2009
7:00 a.m. to 9:45 a.m.**



2701 N. Sepulveda Blvd, Los Angeles, CA 90049
\$30 Advance Registration by November 30
\$45 Registration Fee December 1 and after
Includes Continental Breakfast & CE Certificate

[Register today to receive a additional discount!](#)

Please join JMBM attorney [Robert Braun](#), as he serves as a panelist in this continuing education opportunity.

AGENDA

7:00 to 7:30 Registration & Networking Breakfast

7:30 to 8:30 Panel I: Real Estate & Alternative Investments in Retirement Plans--Panelists Robert Braun, Alex Brucker, and Lance Kimmel

- ERISA Considerations for Alternative Investments in Retirement Plans
- Securities Law framework in structuring Alternative Investments
- LLC, C-Corp, S-Corp, REIT, and other entities that are formed to hold Alternative Investments

8:30 to 8:45 Networking Break

8:45 to 9:45 Panel II: Real Estate & Alternative Investments in Wealth Transfer, Gifts & Estates--Panelists Selwyn Gerber and Baruch Litman

- Tax Strategies for Transferring Wealth to Descendants
- Charitable Giving - Case Studies in Efficiently Transferring Appreciated Assets
- Legal Framework of Using Real Estate and Alternative Investments in Wealth Transfer, Gifts, and Estates

[more details »](#)

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FOCUS:

Mini-Seminar and
Networking Breakfast
for Attorneys, CPAs
& Advisors



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