



LEWITT, HACKMAN, SHAPIRO, MARSHALL & HARLAN

Seminar Series

invites clients and friends to a complimentary seminar:

2014 Year-End Tax Planning

(approved for 1.5 hours of MCLE credit* and 1.5 hours CPE credit**)

What strategies do you need to get the most benefit from your tax, and trusts & estate planning? Michael Hackman & Kira S. Masteller will present our annual seminar, covering these and other topics:

- **Beneficiary Designations:** Key Considerations
- **Transferring Assets to Heirs:** Top Five Transfer Techniques
- **Property Tax Planning:** Rules, Regulations & Restrictions
- **Estate Planning:** Choosing Trustees, Dynasty Trusts & Estate Tax Considerations
- **Gift Tax Planning:** Going, Going, Gone



Michael Hackman, Esq.†



Kira S. Masteller, Esq.

SEMINAR DETAILS

- **Tuesday, November 11, 2014**
8:00 - 9:30 a.m.
- **Lewitt Hackman**
16633 Ventura Boulevard, 11th Floor
Encino, California 91436

- **Light Breakfast Served**
- **Parking Validated**
- **No Charge to Attend**

RSVP to Chris Podbielski: cpodbielski@lewitthackman.com or 818.907.3271.

† Michael Hackman is a Certified Specialist in Tax Law, as designated by the State Bar of California Board of Legal Specialization.

*Lewitt Hackman is a State Bar of California approved MCLE provider.

** CPE Credit

This is a free basic Group-Live seminar requiring no prerequisites and/or advance preparation. After completing the group-live 2014 Year-End Tax Planning law program, you will have received basic knowledge to assist you and your clients in complying with key federal and state tax, trusts and estate planning laws. There will be enough information provided so you know when and if you should advise your clients whether or not they should seek legal assistance. Should you have any complaints, please contact Michele Avnes of our office at (818) 907-3281. Lewitt, Hackman, Shapiro, Marshall & Harlan is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of DPE Sponsors. State Boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

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2014 ACCOMPLISHMENTS

Lewitt Hackman was named a **2014 Top Ranked Law Firm in California**, as published in *The Wall Street Journal*. The selection criteria is determined by Martindale-Hubbell, and is based on the size of the firm and number of attorneys who are rated *AV Preeminent*.

Keith T. Zimmet counseled a company through a recapitalization involving both debt and equity. The recapitalization allows the company to continue to operate multiple locations of a nationally-known, casual dining franchise, and provides additional capital for further expansion.

Kevin E. Rex represented a client in the sale of a \$20 million business. Kevin worked with the client to negotiate the deal and definitive agreements with the buyer. **Michael Hackman**, a Certified Specialist in Tax Law and Chair of our Tax and Trusts & Estates Practice Groups, worked on the structure to reduce the tax consequences of the transaction.

Sue M. Bendavid resolved hotly contested wage & hour and retaliation claims by several former employees of a client. The employees argued they worked round the clock and were fired after filing their claims, which were in excess of \$1 million in damages and fees. Sue convinced the plaintiffs to dismiss their claims for far less than anticipated defense costs.

Michael Hackman, a Certified Specialist in Tax Law, and **Kira S. Masteller** worked with clients who had a considerable income tax event due to the sale of a very successful business, by creating a charitable remainder trust that pays income to our clients during their lives, and ultimately will be distributed to numerous charities upon their deaths. The income tax savings of the charitable donation were significant.

Paul C. Bauducco settled a case against a client on a written guarantee of a commercial lease for less than half of the client's potential liability.

Vanessa Soto Nellis and **Kevin E. Rex** worked with a family law client to resolve pending divorce matters which involved a highly complex division of assets. Vanessa handled the divorce and associated issues, while Kevin structured the equitable distribution of multiple business entities and investment properties.

Andrew L. Shapiro, Thomas Cecil and **David B. Bobrosky** represented a client who suffered numerous, harmful side effects from a defective metal-on-metal hip replacement made by Johnson & Johnson. Our client suffered metal poisoning and other problems because of the product. Andy, Tom and Dave represented her in a national class action lawsuit, resulting in a substantial settlement for our client.

Barry T. Harlan and **David Gurnick** were selected by their peers as **Best Lawyers in America 2015**, as published in *The Wall Street Journal*. Both attorneys are California Certified Specialists: Barry in Family Law, and David in Franchise & Distribution Law.

Tal Grinblat, a Certified Specialist in Franchise & Distribution Law, was named a **2014 Legal Eagle**, as published in *The Franchise Times*. Tal was also appointed Co-Chair of the Franchise Law Committee by the Business Law Section of the State Bar of California for the 2014-15 term.

Vanessa Soto Nellis is now a Certified Specialist in Family Law. To earn the designation, Vanessa underwent an intensive written examination and close scrutiny of experience, education and references, by the California Bar's Board of Legal Specialization.

Michael Hackman, Andrew L. Shapiro, Barry T. Harlan, Michelle S. Robins, Lynn Soodik, Stephen T. Holzer, Sue M. Bendavid, Barry Kurtz, David Gurnick, Tal Grinblat, David B. Bobrosky, and Kira S. Masteller were all named *Southern California Super Lawyers for 2014*. Barry was selected to the *Top 100 Super Lawyers in Southern California* list, while Sue and Steve were named *Top Attorneys in Business*. **Nicole Kamm, Robert A. Hull** and **Nicholas Kanter** were all selected as *2014 Southern California Rising Stars*.

Stephen T. Holzer and **David Gurnick** worked with a franchisor client to enable the client to continue operations at fast food restaurant locations formerly operated by an unsatisfactory franchisee. Additionally, Steve persuaded the State Board of Equalization to not pursue our franchisor client for the franchisee's unpaid sales taxes.

Michelle S. Robins successfully defeated a motion by our client's ex-spouse to unjustly modify the parties' prior settlement agreement.

Barry Kurtz, a Certified Specialist in Franchise and Distribution Law, **Bryan H. Clements, Susan T. Goldstein, Anthony D. Storm, Hannah Sweiss** and **Samuel C. Wolf** all joined our firm this year. Barry is the Chair of our Franchise & Distribution Practice Group, and Bryan joins him as an Associate. Anthony is an Associate in the Family Law Practice Group, and Susan works with the group as an "Of Counsel" attorney. Hannah became an Associate in the Employment and Business Litigation Practice Groups and Sam is an Associate working in our Franchise & Distribution, Real Estate, and Business Litigation Practice Groups.