

Lewitt Hackman invites clients and friends to a complimentary seminar:

## What You Need To Know About: 2016 Estate, Gift & Property Tax Planning

*approved for 1.5 hours of MCLE credit\* and 1.5 hours CPE credit\*\**

### 1. Estate, Gift and Property Tax Planning

### 2. Trustees:

- What are the Trustee's duties upon death?
- What are Trustees generally paid?
- Appointing Trustees: Why aren't children always the best choice?
- How should you choose a Professional Trustee?
- Can or will a Trustee act during your lifetime?

### 3. Estate Planning for Special Assets

- Digital Assets
- Intellectual Property
- Unique Investments



**Michael Hackman<sup>^</sup>**  
Chair, Tax, Trusts & Estate  
Planning Practice Groups



**Kira S. Masteller**  
Shareholder, Trusts & Estate  
Planning Practice Group

Please RSVP to Chris Podbielski:  
818.907.3271 or [cpodbielski@lewithackman.com](mailto:cpodbielski@lewithackman.com)

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

\*\*CPE Credit: This is a Group-Live seminar requiring no prerequisites or advance preparation. You will receive basic information about recent changes to federal and state tax, trusts and estate planning laws. Lewitt Hackman is registered with the National Association of State Boards of Accountancy on the National Registry of DPE Sponsors. State Boards of accountancy have final authority on acceptance of courses for credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors: [www.learningmarket.org](http://www.learningmarket.org). For more information regarding program cancellation policies or any other concerns, please contact Michele Avnes of our office at (818) 907-3281.

<sup>^</sup>Michael Hackman is a Certified Specialist in Tax Law, designated by the State Bar of California Board of Legal Specialization.

- **Wednesday, May 11, 2016**  
**8:00 - 9:30 a.m.**
- **at Lewitt Hackman**
- **Light Breakfast Served**
- **Parking Validated**
- **No Charge to Attend**

## RECENT ACCOMPLISHMENTS

Lewitt Hackman is named one of *U.S. News & World Report's Best Law Firms* as well as *Fortune Magazine's Top Ranked Law Firms* for 2016. The *Best Law Firms* designation was earned for our fourth consecutive year by **Barry T. Harlan** (Certified Specialist in Family Law) and **David Gurnick** (Certified Specialist in Franchise & Distribution Law) as *Best Lawyers* in their respective practice areas. The *Top Ranked Law Firms* designation is attributed to the size of our law firm combined with the percentage of our attorneys rated *AV Preeminent* by Martindale-Hubbell.

**Michael Hackman** (Certified Specialist in Tax Law), **Stephen T. Holzer** (Environmental) and **Sue M. Bendavid** (Employment) earned national recognition as the *Best in Business* by *Super Lawyers Magazine*.

**Barry Kurtz** (Certified Specialist in Franchise & Distribution Law) and **Samuel C. Wolf** negotiated selected rights to develop a chain of fast-casual restaurants for multi-unit franchises in Arizona. Barry and Sam worked out favorable restrictions on royalty obligations as well as additional contract protections which will remain in effect for the next decade.

**Veronica R. Woods** joined our Family Law Practice Group as an Associate in November. In addition to her JD, Veronica earned a Masters of Law in Taxation from the University of Denver.

**Nicole Kamm**, **Hannah Sweiss** and **Amy I. Huberman** resolved a lawsuit by a client's former employee for age discrimination, harassment and retaliation for alleged whistleblowing activity. During mediation, Nicole won a release of all claims, avoiding the need for further litigation.

**Barry T. Harlan** and **Vanessa Soto Nellis** (Certified Specialists in Family Law) obtained a substantial attorney fee order, spousal support and child support, for a client whose spouse refused to pay any support or attorney fees, despite having assets in excess of \$35 Million.

**David B. Bobrosky**, **Andrew L. Shapiro** and **Thomas Cecil** obtained a seven figure settlement for a scooter driver hit by a car turning into an apartment complex. The car's driver had a minimal insurance policy. During our investigation, we determined the turn was unsafe due to inadequate sight distance given the speed limit of the road, and overgrown landscaping. We sued the City, property owner, and the road's design engineers; and pursued a claim against the vehicle's owner for entrusting the car to someone who should not have been driving. Each defendant claimed no responsibility and made numerous motions for summary judgment; and the case was rejected by several prominent law firms. However, Dave, Andy and Tom prevailed – each Defendant contributed significantly to the settlement. Our client is unable to perform the work he used to do, but now has money to pay for his future care and support himself.

**Sue M. Bendavid** and **Nicholas Kanter** won an outstanding jury verdict on behalf of a company who sued a former vice president/employee for embezzlement, conversion, interference, breach of fiduciary duty, defamation and unjust enrichment. The former employee countersued for breach of implied contract, age discrimination, and wrongful termination and made other claims, seeking a seven figure damages award. The jury returned a unanimous verdict in favor of our client for a high six figure amount, and denied the former Vice President/employee all relief requested against our client.

**John B. Marshall** and **Paul C. Bauducco** obtained a temporary restraining order preventing foreclosure on a commercial property securing a deed of trust held by a client and allowing a motion for preliminary injunction preventing foreclosure pending trial to be heard. John and Paul then prevailed on the motion for preliminary injunction, allowing the matter to proceed to trial.

**Lynn Soodik** (Certified Specialist in Family Law) and **Kevin E. Rex** negotiated a resolution for a client in a highly contested divorce matter, in which our client and the former spouse owned multiple properties through various entities.

**Tal Grinblat** (Certified Specialist in Franchise & Distribution Law), as Co-Chair of the Franchise Law Committee of the State Bar of California, co-wrote an Affirmative Legislative Proposal (ALP) to enable franchisors wishing to test California markets to exhibit at trade shows without first registering as franchises. Assembly Bill 1782 was introduced in February.

**Nicole Kamm** and **Tal Burnovski Yeyni** convinced the Employment Development Department (EDD) to reduce an assessment of unpaid taxes and penalties to a fraction of the initial amount assessed. The resolution was the result of more than a year of negotiations with the EDD regarding the classification of employees.

**Kira S. Masteller** prepared an estate plan for a couple whose adult daughter has a severe disability. The daughter's share of the couple's estate will be distributed to a Supplemental Needs Trust with an appointed Trustee to manage and administer the assets during the daughter's lifetime, without disqualifying her from receiving necessary Medi-Cal benefits.

**Keith T. Zimmet** negotiated the acquisition of a nationally known apparel company for our client. The multi-state transaction involved a large equity owner acquiring all the issued and outstanding equity interests of the company. The complex transaction included numerous issues relating to intellectual property, real estate, manufacturing equipment, employment issues, and factoring.