



LEWITT HACKMAN

LEWITT, HACKMAN, SHAPIRO, MARSHALL & HARLAN
A LAW CORPORATION

SEMINAR SERIES

Lewitt Hackman invites clients and friends to a complimentary seminar:

2019 Year End Tax Planning

Approved for 1.5 hours of MCLE credit and 1.5 hours CPE** credit.*



Kira S. Masteller, Esq.
Shareholder



Mark J. Phillips, Esq.[^]
Shareholder



Alex J. Hemmelgarn, Esq.
Associate

Please join our Tax, Trust and Estate Planning Practice Groups for our year-end annual seminar. Topics will include the following:

- Estate Tax Exemptions and Exclusions
- Shift to Cost Basis
- Property Tax Issues
- Decanting Trusts
- Planning for Assets outside of the United States
- Practical Estate Planning Tips

Limited seating. Please RSVP at lewitthackman.com/events/

* 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 laws pertaining to trust and estate planning. 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. For more information regarding program cancellation policies or any other concerns, please contact Michele Avnes of our office at (818) 907-3281.

[^] State Bar of California Certified Specialist in Estate Planning, Trusts and Probate.

**Thursday, November 14, 2019
8:00 - 9:30 a.m.**

- at Lewitt Hackman
- Light Breakfast
- Parking Validated

16633 Ventura Boulevard, Eleventh Floor ▪ Encino, California 91436
lewitthackman.com ▪ 818.990.2120



2019 ACCOMPLISHMENTS

Congratulations our **2020 Best Lawyers in America**, as selected by *Best Lawyers Magazine*: **Michael Hackman, Andrew L. Shapiro, Sue M. Bendavid, David Gurnick, Lynn Soodik, and Kira S. Masteller**. Mike, David and Lynn are all State Bar of California Certified Specialists.

We are pleased to announce that **John B. Marshall** was honored recently by the San Fernando Valley Bar Association with a *President's Award*. John is very active with the SFVBA, donating countless hours to assist the Bar's real estate matters and fee arbitration services.

Congratulations to **Barry Kurtz** (Certified Specialist in Franchise & Distribution Law), named a *2019 Attorney of the Year Trailblazer*, by the *San Fernando Valley Business Journal*.

We are growing! Six attorneys joined Lewitt Hackman this summer: **Zane S. Averbach** (Corporate, Real Estate and Trust & Estate Planning), **Mark J. Phillips** (State Bar Certified Specialist in Estate Planning, Trusts and Probate Law), **Steven L. Feldman** (Business & Civil Litigation, Environmental and Real Estate), **Alex J. Hemmelgarn** (Corporate, Tax and Trust & Estate Planning), **Neil J. De Leon** (Family Law), and **David G. Jones** (Employment).

Jana G. Garrotto was asked to create an entire estate plan within days before a client went into surgery to treat a potentially terminal illness. Jana created a distribution plan to deal with family assets, reflecting the client's dispositive wishes and elective decisions in the event of incapacity or death.

Tal Grinblat (Certified Specialist in Franchise & Distribution Law) and **Matthew J. Soroky** consulted on franchise and compliance matters in relation to Papa John's bringing a well-known celebrity on board. The former professional athlete will act as the new spokesperson, director and part-owner of nine system restaurants.

Kira S. Masteller and **Kyla A. Parrino** created a first party special needs trust to benefit a disabled client who receives public assistance and accumulated enough savings to potentially jeopardize her benefits. The trust allows our client to continue to receive benefits while the Trustee supplements those benefits from the savings in the trust. Upon death, the Department of Health Services will be reimbursed for the benefits they provided during our client's lifetime from the special needs trust.

Paul C. Bauducco obtained a non-dischargeable judgment in United States Bankruptcy Court for a client based on fraud claims against the debtor, which together with prejudgment interest, will be a high six-figure amount for our client.

Sue M. Bendavid counseled a client regarding a mass layoff of employee for financial reasons. Sue worked with our client in establishing protocols for the documentation to minimize risk of potential discrimination or wrongful termination claims.

Keith T. Zimmet successfully guided our client through the acquisition of numerous commercial buildings in several states. Keith negotiated the purchase and sale agreements relating to properties which include nationally recognized anchor tenants.

Vanessa Soto Nellis (Certified Family Law Specialist) and **David Gurnick** settled a case in which an ex-spouse from a nationally-prominent family failed to pay any spousal support to our client for three years, and tried to end future support. Vanessa and David pursued significant discovery, including demands to a complex trust. Our questions forced the opponent to invoke the Fifth Amendment, admitting fear of criminal prosecution. Vanessa and David successfully obtained the funds to cover all past support, attorneys fees, and buy-out of future support.

Kevin E. Rex and **Peter L. Ente** represent a family group in connection with the restructuring of a portfolio of commercial real estate properties valued in excess of \$350 million. Kevin and Peter worked with opposing counsel to craft a tax-advantaged structure, obtain lender consent, and negotiate the necessary documents and instruments so that each party could make independent business and investment decisions.

Barry Kurtz and **Taylor M. Vernon** worked with a franchisor in winding down franchise operations and disposing of the system's assets. In a separate matter, Barry and **Samuel C. Wolf** represented a craft beer importer in developing state-specific distribution agreements.

David Gurnick and **Jessica W. Rosen** represented a client in Superior Court who sued an aircraft maintenance and repair company for success fees based on sales and retainer fees for consulting services. The case involved written and oral contracts. The jury award was more than 10 times the opposing party's highest offer to settle.

Tal Burnovsky Yeyni successfully prevailed on a demurrer on behalf of our clients who were alleged to have failed to pay minimum wage, provide and maintain pay and time records, and engaged in unfair competition.

Paul C. Bauducco and **Melissa M. Mayer** (Certified Family Law Specialist) successfully opposed a motion to compel further responses to discovery, showing that our client reasonably responded to the majority of the discovery at issue.

Tal Grinblat and **Katherine L. Wallman** prepared several Digital Millennium Copyright Act notices to infringers who disseminated a publishing client's works electronically without our client's permission -- leading to the removal of the infringing material.

Andrew L. Shapiro, Thomas Cecil and **David B. Bobrosky** reached a seven-figure settlement for a client involved in an automobile accident. During the course of the investigation, our attorneys discovered the highway was unsafe, enabling our attorneys to bring in CalTrans as a defendant.