

Your business owner clients are facing an array of new changes and challenges.

Starting January 1, 2013, successful business owners may be facing more than six Federal & State income tax increases alone.

Taken individually, these tax increases may not seem that significant but the combined effect may cause your clients to feel the pinch next tax season. So now, more than ever, clients will be motivated to actively explore ways to reduce or defer income.

Secondly, on January 1, 2014, the provisions of the Affordable Care Act (ObamaCare) become fully implemented. Do you know how the plan works, the Penalties involved, the Subsidies, and how to appropriately advise your business owners? This will be an important discussion with business owners that will directly affect their bottom line.

These changes impact the legal decisions around the business, including entity formation decisions, titling, business succession and transition issues, asset protection, and estate planning. Advisors need to understand how these changes may change their recommendations ...and how to malpractice-proof their practice from unintended legal ramifications.

Join local experts as they provide you with the latest information and advanced tax planning strategies that you need to provide your best clients with the type of concierge service that they need and desire.

Sponsored by:

The Law Offices of Rick J. Fenelli, LLP

The Law Offices of Rick J. Fenelli, LLP located in Laguna Hills, CA provides business owners with estate, asset protection, business succession & business entity planning throughout Los Angeles, San Diego, and Orange County CA.



Front Row: Katie Fenelli, Margie Fenelli, Rick Fenelli, Amy Fenelli Ciftcikara and Karianne Fenelli Welch

Back Row: Jeff Poeppel, Lorie Ibasco, Sarah Sullivan, Negin Nazi, and Thomas Welch

Program Details

Thursday, August 1, 2013

8:00 AM - 5:00 PM
Dana Point Yacht Club
24399 Dana Dr.
Dana Point, CA 92629

Friday, August 16, 2013

8:00 AM - 5:00 PM
The Pacific Club
4110 MacArthur Boulevard
Newport Beach, CA 92660

COST
\$225

REGISTER

Please call (949) 699-0000
or register online at
ocsymposium.eventbrite.com/

Agenda

7:30 a.m. – 8:00 a.m.

Registration, Full Breakfast, and Networking

8:00 a.m. – 8:10 a.m.

Welcoming Remarks

Rick Fenelli, Esq., LL.M., *Founder and Partner, The Law Offices of Rick J. Fenelli, LLP*

8:10 a.m. – 10:00 a.m.

Advanced Income Tax Planning for Business Owners – Part I

Between Federal and State Income Taxes, your higher income business owners will face more than six income tax increases, not to mention deduction losses. So now, more than ever, your clients may be motivated to explore ways to help reduce and/or defer income. This session will cover:

- Tax deductible strategies for business owners
- Choice of entity considerations in light of The American Taxpayer Relief Act (ATRA) of 2012
- Tax-efficient asset management

Thomas Welch, Esq., LL.M., *The Law Offices of Rick J. Fenelli, LLP*

Sharon Buck, CFP, CLU, ChFC, *Integrated Planning Solutions & Financial Management Network*

10:00 a.m. – 11:00 a.m.

Advanced Income Tax Planning for Business Owners, Part II

A captive insurance company is a strategy that “may” be appropriate for your more successful business clients and for which they may seek your advice. This session will fully prepare you by exploring the use of different types of captive insurance company structures as a tax-advantaged risk management strategy for mid-size businesses. The pros and cons of captives will be covered, including issues that are the current focus of the IRS.

Wes Sierk, *Founding Partner, Risk Management Advisors*

11:00 a.m. – 12:00 p.m.

Advanced Income Tax Planning for Business Owners, Part III

Most qualified plans are “employee” oriented, in that most of contributions are for the benefit of rank and file employees. However, it is possible to implement a customized “employer” oriented plan that significantly benefits the business owner. This session will cover advances in qualified plans, including using compliant plan layering to maximize owner tax deductibility and benefits.

Bruce Gendein, CLU, ChFC, *President, The Senex Group*

12:00 p.m. – 2:00 p.m.

Lunch Presentation: Affordable Care Act Repercussions for Businesses

Enjoy a deliciously prepared luncheon, as we discuss the issues of how ObamaCare will impact our business owner clients.

The provisions of The Affordable Care Act are fully implemented as of January 1, 2014. In order to properly advise your business clients, you need to be familiar with the requirements and health care options available to businesses. This session will discuss the always evolving rules on such issues as essential health benefits, the affordability requirement, W-2 reporting requirements, changes to health FSAs, and the pay or play penalties.

Marilyn Monahan, Esq., *Founder, Monahan Law Office*

Hunt Turner, *Vice-President, Sullivan Curtis Monroe*

2:00 p.m. – 3:00 p.m.

Estate Tax Planning for Business Owners, Part I: Business Transition & Estate Planning Issues for Owners

Rick Fenelli, Esq., LL.M., *Founder and Partner, The Law Offices of Rick J. Fenelli, LLP*

3:00 p.m. – 4:30 p.m.

Estate Tax Planning for Business Owners, Part II: Asset Protection Structures & Concepts for Business Owners

Rick Fenelli, Esq., LL.M., *Founder and Partner, The Law Offices of Rick J. Fenelli, LLP*

Register Now!

Name: _____

Firm: _____

Email: _____

Phone: _____

I plan to attend:

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Cost: \$225

Mail Registration Form and Check Made Payable to:

Law Offices of Rick J. Fenelli, LLP
24031 El Toro Road, Suite 260
Laguna Hills, CA 92653

This program
provides 8.0 units
of CPE credit

Symposium Presenters



Rick Fenelli, Esq., LL.M. Rick Fenelli, Esq., LL.M. Rick is the founder of The Law Offices of Rick J. Fenelli, LLP and focuses his practice in the field of Estate Planning, Estate Administration, and entity formation. He has practiced in Orange County for the past 34 years and has lectured extensively throughout Southern California as the keynote speaker to large corporations, State and County

Conventions, life underwriters' conventions, as well as to the general public. He has been a regular on radio stations and has made several television appearances. He is the author of THE FINANCIAL PROBLEM SOLVER which is available nationwide. He attended Western State University School of Law where he received his Juris Doctorate degree, and extended his education by attending classes at the Masters of Business Tax program at USC. In addition, he received his LL.M, Masters in Taxation, at Chapman University School of Law in 2007.



Thomas J. Welch, Esq., LL.M. Tom is of council with the Fenelli law firm and is admitted to practice law in the states of California and Florida. Tom is also admitted to practice before the Northern and Central Federal District Courts. Areas of practice include Trust, Estate and Probate Litigation, Trust Administration, Estate and Tax Planning, as well as business/corporate matters. Prior to his legal education,

Tom attended Florida State University and graduated with a B.S. degree in History. He then attended Thomas Jefferson School of Law in San Diego and earned his Juris Doctorate degree, and from Chapman University earning his LL.M in Taxation.



Bruce Gendein, CLU, ChFC Bruce is President and Co-Founder of The Senex Group, an integrated financial services firm headquartered in Woodland Hills, California. Bruce along with his two partners, Alex Knezevich and Wayne Scott, started The Senex Group in 1992. The firm specializes in the design, implementation and administration of qualified retirement plans for clients

nationwide. For over 30 years Bruce has served clients as an advisor dealing with financial and pension matters. He is a nationwide speaker on Defined Benefit Plans. He is on the Board and Former President of the San Fernando Valley Chapter of the Society of Financial Service Professionals.



Wesley Sierk Wesley is the President and Co-Founder of Risk Management Advisors. He is a nationally recognized expert in field of captive insurance company design, implementation, risk transfer and captive insurance company management. Wesley has close to 18 years helping highly profitable, closely held businesses limit their risk exposure and taxes through captive insurance company planning, qualified plan

structures, onshore and off-shore entities, and trust arrangements. He is the author of Taken Captive: The Secret to Capturing Your Piece of America's Multi - Billion Dollar Insurance Industry. He is also the author of You Can Make It, But Can You Keep It? a book to teach the wealthy how to hold on much of their hard earned assets.



Sharon A. Buck, CFP, CLU, ChFC. Sharon is president of Integrated Planning Solutions, a member of Financial Management Network. As a Certified Financial Planner, Sharon has almost 20 years experience serving businesses and high net worth families in the areas of business contingency, succession, tax strategy, and estate planning. Before forming Integrated Planning Solutions, Sharon served as Vice-President for a

private company, Atlantis Financial Group, providing financial analysis and customized recommendations for business owners. She also served as Assistant Vice-President for a NYSE company, National Financial Partners. She is co-president of the Estate Planning Council of South Orange County, and member of the Financial Planning Association, ProGrowth, and the National Association of Women Business Owners.



Hunt Turner, Vice-President, Sullivan Curtis Monroe Hunt Turner applies over 16 years of employee benefits experience, holding positions in management and sales on both the carrier and broker sides of the business. Hunt's primary focus is helping companies prepare strategically for the challenges in employee benefits with an emphasis on healthcare. Hunt earned his B.S., Financial Management from Cal Poly, San Luis Obispo. He serves as Vice Chair of PIHRA District 4.

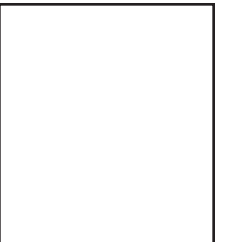


Marilyn Monahan, Esq. Marilyn is the founder of Monahan Law Firm. She is an attorney who specializes in employee benefits and insurance corporate and regulatory law. Marilyn focuses her practice on advising employers, health plans, and consultants on compliance with federal and state employee benefit and insurance laws and regulations. Her volunteer activities include serving on the Board of Directors of PIHRA as President-Elect.

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