



Lum, Drasco & Positan LLC

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ATTORNEYS AT LAW SINCE 1870



Please join us for a succinct, fast-paced, yet important *Lunch Seminar* and *Panel Discussion* by leaders in the field on

Top 10 Tax Mistakes to Avoid in Life Insurance Planning

A Program for Certified Public Accountants

Wednesday, August 21, 2013, 12:00 – 2:00 pm

Hosted by:

LUM, DRASCO & POSITAN LLC
103 Eisenhower Parkway
Roseland, New Jersey

Join us for a 2-hour program featuring a panel discussion, with leading attorneys

- Ineffective Beneficiary Designations
- Checking the Life Settlement Market
- Improper Ownership of Policy
- Observing Formalities of Trust
- COLI Best Practices
- Employee Benefit Transactions Pitfalls
- Triggering Transfer for Value
- Traps for the Unwary – Split Dollar
- LLC Key Person Insurance Coverage
- Maximizing Charitable Planning Opportunities

Panelists:

Jack P. Baron: Jack, with more than 30 years of experience, works primarily in the areas of trusts and estates, including estate planning and administration; commercial transactional matters, including acquisitions and divestitures, and succession planning; and tax planning for individuals and businesses.

Kevin F. Murphy: Kevin has more than 30 years of experience in tax and business planning, fiduciary counseling, estate planning and administration, family held businesses, elder law, guardianships, mergers and acquisitions, employee benefits, executive compensation and nonprofit organizations.

EARN 2.0 HOURS OF NEW JERSEY CPE CREDIT.

Please RSVP by August 16, 2013 to Susan Kulig at (973) 228-6729 or skulig@lumlaw.com
Attendance is complimentary.