

Thursday Insights for October 2008
2:30 p.m. – 4:00 p.m.

Thursday, October 2, 2008: **Collaborative Planning for Business Owner**
with Gregory Banner, CFP, CLU, and Alejandro Matuk, Esq.

Greg and Alex will address issues that business owners should consider when evaluating the future prospects of their company and how a professional collaborative approach can be utilized to provide greater value to the client. The topics to be discussed include how entity selection, formation, and review can be a valuable part of the business. We will also discuss tax reduction strategies and real life examples.

Thursday, October 9, 2008: **The Stretch IRA**
with John L. Jenkins, AEP, CSA, EA, CFP, and Rodney J. Hatley, Esq.

This workshop will continue a series on strategies for the large IRA. Last month we discussed leveraging the large IRA through life insurance. This month we will explore the amazing power of the Stretch IRA, how to set it up, timeline requirements, IRA custodian issues and pitfalls as well as guaranteeing the payout over the life expectancy of the named beneficiary.

Thursday, October 16, 2008: **5 Ways Out of Highly Appreciated Property**
with Ronald R. Ceniceroz, Financial Planner

You have probably heard of 1031 Exchanges, T.I.C.'s and Triple Nets. There are at least 5 ways to sell highly appreciated property and avoid, or delay, the tax consequences. We will discuss and compare options and opportunities for both advisors and clients.

Thursday, October 23, 2008: **Basic Corporate & Business Taxation – Part 1**
with Stephanie S. Downer, Esq., and Rodney J. Hatley, Esq.

This workshop is Part 1 of an overview of the basic concepts of federal income taxation of C Corporations and their shareholders, including organization of corporations; cash and stock dividends; redemptions of stock; partial and complete liquidations; and sales of corporate businesses and reorganizations.

Thursday, October 30, 2008: **Pre-Empted Due to the SCI Team Building Event**

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