

NEW ESTATE TAX LAW

Unprecedented Estate Tax Confusion Explained

(For High Net Worth Individuals)

**Attend this special event
and you will learn:**

“Clear and informative”
– Wendy Moore

“Very articulate and to the point.
Excellent education.”
– Peter Minocha

“Your presentations are fabulous”
– Behfar Bastani

- How a special election under the NEW LAW could save or make millions of dollars (for heirs of someone who died in 2010)
- The “GIFT BONANZA”* under the NEW LAW: how the wealthy can pass an extra \$8 million to their heirs ...and how to exponentially multiply that gift *New York Times, 12/17/10
- The short-term window of opportunity created by the NEW LAW and how to take advantage of it before it disappears
- How critical trust amendments can minimize tax under the NEW LAW
- One of the biggest mistakes the wealthy unknowingly and inadvertently make in their wills that result in their losing control of how their estates are distributed ... and how to avoid that trap
- How to protect your assets when your spouse (or child) remarries
- Critical update from a “fiduciary” wealth advisor.... And much more!

“Estate planning is about to get easier for taxpayers—with more benefits for heirs.”
– Wall St. Journal, 12/12/10

“Few things are more important to an individual than planning his or her estate. This determines who will receive your property at your death, how much of your property will go to the government in taxes, and whether your property will pass through a probate estate...”
– Forbes, 12/10/10

Featured Guest Speaker
Alan Kaye, CLU, ChFC

New tax laws pose a challenge to seniors and anyone who already owns at least \$500,000 of life insurance.

- Do you still need or want the life insurance you bought before the laws changed?
- If not, is there a smart way to sell it for more than its cash surrender value?
- Is your existing coverage still the best way to accomplish your estate planning goals?
- What new insurance planning opportunities exist to increase my estate value?



FREE PUBLIC FORUM

BEVERLY HILLS
Monday, March 21st - 7 pm
Four Seasons Hotel
300 South Doheny Drive
(No-host valet parking \$14/car)

PASADENA
Tuesday, March 22nd - 10 am
The Langham Huntington Hotel and Spa
1401 South Oak Knoll Avenue
(No-host valet parking \$12/car)

SHERMAN OAKS
Wednesday, March 23rd - 10 am
Courtyard by Marriott
15433 Ventura Blvd
(between Haskell and Sepulveda)
(No-host self-parking \$12/car)

Refreshments Served

Very limited seating! Reservations required.

**Must be prequalified High Net Worth Individual to attend.
Call now: (310) 295-1951 or e-mail: lisa@lermanlaw.com**



Featured commentator
on television and radio

Michelle C. Lerman
ATTORNEY AT LAW

**Free Private
Consultation
(\$225 Value)**
(For Qualified Attendees Only)

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