



Asset & Lifestyle Protection Planning and Strategies for Estate Lawyers, CPAs, and Financial Service Professionals

Jeffrey Verdon, Esq. of Jeffrey M. Verdon Law Group, LLP & Barry Engel, Esq. of Engel & Reiman pc

January 21, 2016

Time: 5:30 – 8:00 p.m.

Pillsbury Winthrop Shaw Pittman, LLP
2550 Hanover Street, Palo Alto CA 94304

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Lawyers, CPAs, and Financial Service professionals can be held personally liable once the E&O coverage is exhausted, not just for their malfeasance, but also for those whom they supervise. This malpractice exposure doesn't end once you stop working but lasts well into the retirement years. Jeffrey M. Verdon, Esq., and Barry S. Engel, Esq., two of the leading experts in the area of comprehensive estate planning with asset protection will review proper due diligence and ethical considerations for this practice area and review some of the more "effective" asset protection strategies trust and estate lawyers, CPAs, and financial services professionals should consider employing to protect against unforeseen future liability claims.

Jeffrey Verdon, Esq. – Managing Partner at Jeffrey M. Verdon Law Group, LLP

Jeffrey Verdon is Managing Partner of Jeffrey M. Verdon Law Group, LLP. He has been practicing law in the areas of taxation and comprehensive estate planning since receiving his Masters of Law (LL.M. Taxation) from Boston University in 1979. He specializes in estate, trust and income tax planning, and asset and lifestyle protection planning for high-net worth clients across the United States. Mr. Verdon was a Fellow and Senator of the distinguished Isle of Man-based *Offshore Institute*, a professional body that is dedicated to the education and training of competent practitioners in offshore and international finance and tax planning, and to improving the professional standards of those who dispense professional advice in this field. He is also one of the founding members of one of the earliest and most distinguished publications on comprehensive estate planning, *Jacob's Report on Asset Protection Strategies*.

Barry S. Engel, Esq. – Founding Principal at of Engel & Reiman pc

Barry S. Engel is the founding principal of Engel & Reiman pc, a Denver, Colorado-based law firm with an international client base and an international reputation for excellence in asset protection planning and integrated estate planning. Mr. Engel is one of three co-authors of the 1989 amendments to the Cook Islands International Trust Act (1984), as enacted by the Parliament of the Cook Islands. The first asset protection specific statutory trust law of its kind, this enactment has served as the model for similar trust law as subsequently adopted in more than 20 offshore financial centers and by close to 30% of our country's state legislatures.

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