

**THE COMMUNITY FOUNDATION OF
ORANGE AND SULLIVAN**

AND THE

**JEWISH FEDERATION OF
GREATER ORANGE COUNTY**

INVITE YOU TO A SEMINAR:

**A TIME TO PLAN –
UNPARALLELED
OPPORTUNITIES**

FOR ATTORNEYS, ACCOUNTANTS,
FINANCIAL PLANNERS, TRUST OFFICERS,
WEALTH MANAGEMENT ADVISORS AND
THEIR CLIENTS, AND NONPROFIT
EXECUTIVES

**ATTORNEYS RECEIVE 3.0 CLE
CREDITS IN SKILLS.**

**ACCOUNTANTS RECEIVE 3.0 CPE
CREDITS.**

FIELD OF STUDY: SPECIALIZED KNOWLEDGE/TAXATION
(2.0 IN SPECIALIZED KNOWLEDGE AND 1.0 IN TAXATION)

**CERTIFIED FINANCIAL PLANNERS RECEIVE
3.0 CFP CREDITS.**

**TWO OPPORTUNITIES
(SAME WORKSHOP ON EACH DATE)**

MONDAY, SEPTEMBER 21, 2009

OR

THURSDAY, OCTOBER 22, 2009

REGISTRATION: 4:30 P.M.

SEMINAR: 5:00 P.M. TO 8:00 P.M.

**ORANGE COUNTY CHAMBER OF COMMERCE
BUSINESS CENTER**

30 SCOTT'S CORNERS DRIVE MONTGOMERY, NY 12549
FOR DIRECTIONS, GO TO: WWW.ORANGENY.COM

A LIGHT SUPPER WILL BE SERVED

FEE: \$35.00 PER PERSON

\$30.00 MEMBERS OF NYSSCPA

SEATING IS LIMITED

PLEASE RSVP BY SEPTEMBER 9TH

PANELISTS

STEVEN L. TARSHIS, JD, LL.M. TAXATION -
TARSHIS CATANIA LIBERTH MAHON & MILLIGRAM, PLLC
MARK KROHN, ESQ. -
JACOBOWITZ & GUBITS, LLP
WILLIAM QUACKENBUSH, ASA, CBA -
ADVENT VALUATION ADVISORS, LLC
EDIE HAUGHNEY, IMCA[®] CIMA, SR. FINANCIAL ADVISOR /
ASSIST. VICE PRESIDENT - MERRILL LYNCH
RICHARD J. SHAPIRO, JD -
BLUSTEIN, SHAPIRO, RICH & BARONE, LLP
DONALD HOLZHAMMER, CLU (9/21/09) AND
DON BADGLEY, FIELD DIRECTOR (10/22/09) -
NORTHWESTERN MUTUAL FINANCIAL NETWORK
SCOTT LASK -
SCOTT LASK WEALTH MANAGEMENT GROUP LLC
CHRISTOPHER J. BYRNE, CPA, JD

*THE PROGRAM IS TRANSITIONAL AND APPROPRIATE FOR EXPERIENCED AND NEW ADMITTED ATTORNEYS. THE WOMEN'S BAR ASSOCIATION OF THE STATE OF NEW YORK HAS BEEN CERTIFIED BY THE NEW YORK STATE CONTINUING EDUCATION BOARD AS AN ACCREDITED PROVIDER OF CONTINUING LEGAL EDUCATION IN THE STATE OF NEW YORK. *FULL AND PARTIAL SCHOLARSHIPS BASED ON NEED ARE AVAILABLE. FOR GUIDELINES INFORMATION, PLEASE CONTACT MAUREEN CRUSH AT 845-790-9127. ALL REQUESTS ARE CONFIDENTIAL.



MAIL THIS FORM OR REGISTER AT WWW.CFOC-NY.ORG

SEMINAR: A TIME TO PLAN – UNPARALLELED OPPORTUNITIES

\$35 PER PERSON / \$30 (MEMBERS OF NYSSCPA'S RECEIVE \$5 DISCOUNT)

CHECK ONE DATE: SEPT. 21 _____ OCT. 22 _____

NAME: _____ FIRM/COMPANY: _____

ADDRESS: _____

PHONE: _____ E-MAIL: _____

CLE CREDITS _____ CPE CREDITS _____ CFP CREDITS _____

PLEASE SEND COMPLETED FORM AND CHECK PAYABLE TO:
COMMUNITY FOUNDATION OF ORANGE AND SULLIVAN
30 SCOTT'S CORNERS DR., STE. 202, MONTGOMERY, NY 12549
MORE INFO: 845-769-9393 ADMIN@CFOC-NY.ORG WWW.CFOC-NY.ORG



COMMUNITY FOUNDATION

of Orange and Sullivan
30 Scott's Corners Drive
Suite 202
Montgomery, NY 12549

NON PROFIT ORG
US POSTAGE PAID
NEWBURGH, NY
PERMIT #8604

**AN INVITATION—CONTINUING EDUCATION SEMINAR
“A TIME TO PLAN - UNPARALLELED OPPORTUNITIES”**

CONTINUING EDUCATION SEMINAR “A TIME TO PLAN – UNPARALLELED OPPORTUNITIES”

SPONSORS

**JEWISH FEDERATION OF GREATER ORANGE COUNTY
COMMUNITY FOUNDATION OF**

ORANGE AND SULLIVAN

**NORTHWESTERN MUTUAL FINANCIAL NETWORK
SCOTT LASK WEALTH MANAGEMENT GROUP**

**CO-SPONSORS: MID-HUDSON CHAPTER OF THE NEW
YORK STATE SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS,**

**WOMEN'S BAR ASSOCIATION OF ORANGE & SULLIVAN
COUNTIES (A CHAPTER OF THE WOMEN'S BAR**

**ASSOCIATION OF THE STATE OF NEW YORK), HUDSON
VALLEY FINANCIAL PROFESSIONALS, PROBONO NY**

ORANGE COUNTY LOCAL ACTION COMMITTEE