

Thursday Insights for March 2012 2:30 p.m. – 4:00 p.m.

March 1, 2012 – Begin with the End in Mind – Choosing an Entity; *Presented by Gregory Banner, CLU®, CFP®, CRTP and Alejandro Matuk, Esq.*

Choosing an Entity: Sole Proprietorships, Partnerships, Corporations, and Limited Liability Companies.

Evaluating The Entities - This course surveys each business entity option. Multiple considerations dictate which choice of entity, for example: What are the business goals of the owner(s)? How does ownership, liability protection, capitalization, management, sale of the business, estate planning, taxation, and owner and employee benefits affect the choice of business entity? Learn The Entity Choice Matrix.

March 8, 2012 – Quarterly Mixer: Get Ready for March Madness!



While we often come together for education and collegiality, let's take this opportunity to just enjoy each other's company and gear up for the NCAA Basketball Tournament. Support your favorite team, make your picks, and enjoy some great food and drinks!

March 15, 2012 – The 401K Regulatory Chaos; *Presented by Peggy Lombardo, CFP® EA and Maureen Verduyn, CFP®, M.E.d.*

A regulatory tsunami is headed toward companies sponsoring 401(k) plans. It will arrive next year when new federal rules take effect, creating an unprecedented burden of accountability for employers. Employers are already required to exercise this due diligence by ERISA of 1974, yet the fees charged by large financial institutions providing 401(k) plans vary widely and are extremely difficult for employers and employees to ascertain. More than ever, employers will be required to assure that fees associated with these plans are reasonable for the services being provided.

March 22, 2012 – Immigration Planning – Gaining Foreign National Business Owner and Investment Clients; *Presented by Steve Garmo, Esq. and Alejandro Matuk, Esq.*

Join Steve, an expert in immigration law, and Alex, an expert in cross-border and business planning, as they weave both concepts together to share with us how to attract, engage, and work with clients who are citizens of other countries and plan on investing within the U.S. The opportunities for financial advisors, CPAs, attorneys, and bankers are ever expanding with client interest at an all time high.

March 29, 2012 – Pre-Empted due to the Strazzeri Mancini and Southern California Institute Team Building Event

Every 5th Thursday, the Strazzeri Mancini LLP & Southern California Institute Teams close the offices early to enjoy an afternoon of fun team building activities.