

## Profiles

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### PARTNERS:

**JEROME A. DEENER** possesses a Master of Laws Degree in Taxation from NYU School of Law and has been practicing tax law since 1968. In 2006 and 2007, he lectured before the NYU Tax Institute. Additionally, he is a frequent lecturer for the New Jersey Institute for Continuing Legal Education (ICLE), the New Jersey State CPA Society, Chartered Life Underwriters, professional organizations, annual meetings of the New Jersey Bar Association, and other State Bar Associations. He has authored numerous articles on tax and estate planning. Mr. Deener is a past President of the Bergen County Estate Planning Council and former Adjunct Professor of Taxation at the Fairleigh Dickinson University Graduate Business School. Mr. Deener is a fellow of the American College of Trust and Estate Counsel, and authors the *Estate Planning Strategist*, a book published by ICLE. Mr. Deener has also authored chapters on the drafting of Wills and Trusts for the New Jersey Practice Series published by West Publishing. Mr. Deener has been quoted in *The New York Times*, *Wall Street Journal*, *Business Week*, *Forbes Magazine* and other national publications. He is the recipient of the 2005 Distinguished Service Award for his many years of dedication and contributions to the field of continuing legal education as a lecturer and author for ICLE.

**DEBRA T. HIRSCH** has been practicing tax law since 1980. Ms. Hirsch began her career with a major Wall Street law firm. Ms. Hirsch received her J.D. from Columbia University School of Law in 1980, has participated in the Master of Laws Degree program in Taxation from NYU School of Law, has lectured before ICLE and other professional groups and has co-authored articles on estate tax law, including the Third Edition of the *Estate Planning Strategist*. Ms. Hirsch is a Fellow of the American College of Trust and Estate Counsel.

**ADAM M. GRENKER** first practiced in the area of taxation at Kirkland & Ellis in New York and subsequently at a New York trusts and estates boutique law firm focusing on U.S. succession and estate planning for international families. Mr. Grenker received his J.D. degree from the University of Pennsylvania Law School in 1998 and his B.S. degree in Commerce from the University of Virginia in 1995. Mr. Grenker has contributed to several articles on tax law and assisted in the preparation of the Third Edition of *Estate Planning Strategist*. Mr. Grenker focuses his practice in the areas of taxation, estate planning and administration and business entities.

### COUNSEL:

**JULIA S. EPSTEIN** practices litigation in all areas of trust and estate law. Ms. Epstein graduated *cum laude* and Phi Beta Kappa from Rutgers College of Rutgers University in 1997 and received her J.D. from Rutgers School of Law-Newark in 2000.

**ERICA J. GOLDBERG** worked in the Estates & Personal Group of Sullivan & Cromwell, LLP for more than five years, and then in the Family and Business Planning Group at Withers Bergman, LLP for almost two years. Ms. Goldberg received her J.D. from Benjamin N. Cardozo School of Law in 2000.

**CORNELIUS J. O'REILLY** practices in the areas of estate controversy litigation, and represents individuals and corporations with federal and multistate taxation issues, audits and appeals, as well as individual and corporate tax planning. Mr. O'Reilly received his J.D. and Master of Laws Degree in Taxation from NYU School of Law, and his B.S. in Finance from Fordham University.

Before making your choice of an attorney, you should give this matter careful thought. The selection of an attorney is an important decision. If you find this communication inaccurate or misleading, report same to the Committee on Attorney Advertising, Hughes Justice Complex, P.O. Box 037, Trenton, New Jersey 08625.

## Deener, Hirsch, P.C., now with Fox Rothschild LLP, presents its 33rd Annual Tax and Financial Planning Seminar Series 2010-2011

### For CPAs, Attorneys, Life Underwriters and Financial Planners

#### Seven\* Evening Sessions

#### September to June

\*Five tax-related sessions for all participants.  
Two Auditing Sessions for Accountants only.

## Financial Advisor's Role in Modern Financial and Tax Planning and Compliance

### Accountants:

20 CPE Credits – New York and New Jersey  
(16 Credits Tax – 4 Credits Auditing for Accountants)  
NY License #000055 – NJ License #20CE00017200

### Attorneys:

CLE Credits available for September program  
Other sessions credits pending



Fox Rothschild LLP  
ATTORNEYS AT LAW

## How You Will Benefit

The Tax and Financial Planning Seminar Series is designed to meet the demands of your clients in a highly competitive and vastly changing tax world. The firm is an approved sponsor for New York and New Jersey CPE Credits for both CPAs and PAs.

Major tax legislation is expected to be enacted before year end that will affect all taxpayers and the way professionals advise their clients.

These courses are designed to cover practical and timely applications of topics relevant to the legal, accounting and financial planning practices. Practical planning, drafting and compliance considerations will be discussed. Two sessions involving auditing issues for accountants are scheduled to be conducted by a qualified CPA.

Detailed outlines, drafting samples (where relevant) and tax return examples are distributed at each session. Ample opportunity exists for questions and answers, as well as an exchange of ideas among fellow professionals.

### Scheduled Monday Sessions

**Dates:** September 20                      January 24\*  
 October 18                                May 16  
 November 15                              June 20  
 December 20\*

**Time:** 5:30 to 8:15 p.m.

\* *Special Auditing session for Accountants only (5:30 to 7:30 p.m.)*

**Location:** Saddle Brook Marriott  
 138 New Pehle Avenue  
 Saddle Brook, NJ 07663

For questions or more information on these programs, please contact Helen Riggins at 973.548.5037 or [hriggins@foxrothschild.com](mailto:hriggins@foxrothschild.com).

This year's course is co-sponsored by:



## Anticipated Topics

- Discussion of anticipated legislation dealing with estate and income tax changes and how the new legislation affects the professional's practice
- Estate planning in low interest rate, down-market conditions
- Review of major new cases, rulings and regulations over the past year on corporate, individual, gift and estate tax, and IRS practice and procedure
- Enhancing the professional's practice through litigation support (coordinated by the firm's litigation attorneys)
- Professional's role in conducting IRS and state tax audits, including effective negotiating techniques
- How to move to or establish trust situs in favorable tax jurisdictions
- Planning with life insurance, including premium financing
- Tax and estate planning for the terminally ill client – New Jersey and federal issues
- State domicile issues relating to income and estate tax and how to effectively change client's domicile
- Structuring corporate and partnership/LLC buyouts, including redemptions and cross purchase, basis issues and ordinary income versus capital gains.
- Succession planning for closely-held business entities, including family issues, tax issues and commercial issues
- Income and estate tax issues in connection with matrimonial matters, including divorce issues to be discussed by matrimonial attorneys
- Roth IRAs and when to convert or not to convert from traditional IRA
- Auditing (2 sessions: December & January) – Accountants only

## Registration Form

### Fee:

Attorneys, Life Underwriters and Financial Planners: \$360 per year (\$300 each additional enrollee from the same firm) for 5 sessions (excludes 2 auditing sessions for accountants only)

Accountants: \$450 per year (\$350 each additional enrollee from the same firm) for 7 sessions, including 2 sessions of auditing for accountants only

**Send check payable to Fox Rothschild LLP and registration form to:**

**Fox Rothschild LLP**  
**Attn: Helen Riggins**  
 75 Eisenhower Parkway  
 Suite 200  
 Roseland, NJ 07068-1600

### 2010-2011 Registration Form Tax and Financial Planning Seminar Series

Area(s) of Practice

- Accountant     Attorney     CLU     Financial Planner  
 New York     New Jersey

Name(s) \_\_\_\_\_  
 Firm \_\_\_\_\_  
 Street \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Telephone \_\_\_\_\_  
 E-mail \_\_\_\_\_