

Continuing Education Credits

August 8 and September 30, 2008

8:30 a.m. – 5:00 p.m.

You are cordially invited to attend our continuing education program entitled:

“Exit and Estate Planning for CFOs (and Other Business Owner Advisors)” Call for information regarding Continuing Education

This program, sponsored by the law offices of **Davis & Associates, P.C.**, consists of one full-day session designed to review exit and estate planning techniques and strategies with an emphasis on building your practice using practical solutions to exit and estate planning problems for CFOs.

This program emphasizes class questions and participation. Topics include:

<ul style="list-style-type: none">▪ Succession Challenges Facing the Business Owner<ul style="list-style-type: none">▪ Leaving vertically, horizontally or as a passive owner	<ul style="list-style-type: none">▪ Estate Planning for the Business Owner<ul style="list-style-type: none">▪ Ownership of the business▪ Management structure of the business▪ Considerations unique to business owners▪ Planning and managing for the owner's disability▪ Planning for the owner's death▪ Ownership of property▪ Coordination of beneficiary designations▪ The role of the surviving spouse▪ Estate tax planning for the business owner▪ Compression, freezing, and transfer techniques for the business interest
<ul style="list-style-type: none">▪ Exit Planning for the Business Owner<ul style="list-style-type: none">▪ Who, when and how much▪ Valuation Strategies▪ What to do “On the way out”▪ Strategies for selling to 3rd parties▪ Techniques to sell to insiders▪ Dealing with the 4 what if's of your business	
<ul style="list-style-type: none">▪ Setting Goals for the Business Owner<ul style="list-style-type: none">▪ Business and family goals and working-in-your business trap	
<ul style="list-style-type: none">▪ Action Plan for Business Owners	

This instructor led program is presented by Keith Davis, JD, MBA, LLM (Tax), Principal of Davis & Associates, P.C. and Mr. David K. Seems, ChFC, Managing Partner of Business Advisors, LLC. The program is presented from 8:30 a.m. to 5:00 p.m. at the Davis Conference Center at 523 Park Point Dr., Suite 101, Golden, CO 80401.

Registration is required as seating is limited.

Please complete the form, mark the date you want to attend, and register by:

1. Calling our 24-hour seminar line (303) 531-5163 and leave a voice mail message,
2. Signing up on-line at www.davisassocpc.com or
3. Faxing your information to: (303)670-5381 (confirmation sent back)

(Please print clearly)

1-day course fee: \$79.00 (includes lunch)

Name	Firm/Co. Name	Address
E-mail	City, State, Zip	
Phone #	Fax #	
Payment Method: <input type="checkbox"/> VISA _____ <input type="checkbox"/> MC _____		
SEC Code on Back of Credit Card: _____ Exp. Date _____		
<input type="checkbox"/> Check (Please send to Davis & Associates, 523 Park Point Drive, Suite 100, Golden, CO 80401) (Please indicate the program you will be attending)		
<input type="checkbox"/> August 8, 2008 <input type="checkbox"/> Sept 30, 2008		