

november 7 • los angeles airport
november 8 • san francisco & webcast

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FAMILY LAW CONFERENCE



**CalCPA EDUCATION
FOUNDATION**

FAMILY LAW CONFERENCE

Highlights

- Case law update
- Marital standard of living
- Income for support
- Taxing same-sex couples: how are we doing with *Perry* and *Windsor*?
- Best practices for case management
- Tax strategies
- Fair compensation
- Persuasive presentations

Nov. 7 Los Angeles Airport

Nov. 8 San Francisco & Webcast

Family law is a thriving practice area for both CPAs and attorneys. Valuing divorce assets, advising clients through the divorce process, understanding the latest legislation and tax laws are just a few important family law issues.

Gain insight from CPAs, attorneys and judges as they share critical information impacting your family law practice. As your clients face separation, divorce or support conflicts, they will rely on you to guide them through their family disputes. At this conference, you'll learn about breaking developments, legislation and trends in the family law arena. Plus, the conference provides an excellent opportunity to network with judicial officers, attorneys and other professionals.

Lunch is provided for all attendees.

Designed For

CPAs, attorneys, judges, other professionals and staff who require current knowledge of family law cases and issues.

Planning Committee

Charles Burak, CPA, ABV, CVA
Conference Co-Chair
Glenn, Dawson, Burak LLP
Walnut Creek

Lorna A. Mouton Riff, CPA, CFF
Conference Co-Chair
Jaffe and Clemens
Beverly Hills

Brandon Blevans, Esq.
Blevans and Blevans
Napa

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Schultze, Boone & Silva
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Denise M. Frey, CPA, ABV, CFF, CVA
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San Rafael

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Walnut Creek

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Hargrave & Hargrave, CPAs
Los Angeles

Tracy Farryl Katz, Esq., CPA, CFF
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Los Angeles

Monica Mazzei, Esq.
Sideman & Bancroft, LLP
San Francisco

Donald J. Miod, CPA, ABV, CVA, CBA, FCPA,
CFF, CFS, CGMA
Miod and Company, LLP
Valencia

Mike Radakovich, CPA, ABV, CFF, CVA
Radakovich, Shaw & Blythe, LLP
San Luis Obispo

Fred Rey, CPA, CVA, ABV, CFF
Seiler, LLP
San Francisco

Jeremy Salvador
Miod and Company, LLP
Valencia

FAMILY LAW CONFERENCE 2013

Program

CREDIT INFORMATION

CPE: 9.0 Hours

MCLE: 7.5 Hours

Legal Specialization
(Family Law):
7.5 Hours

Level: Update

Prerequisites: None

8:30 AM

WELCOME AND INTRODUCTIONS

Charles Burak, CPA, ABV, CVA

*Conference Co-Chair
Glenn, Dawson, Burak LLP
Walnut Creek*

Lorna A. Mouton Riff, CPA, CFF

*Conference Co-Chair
Jaffe and Clemens
Beverly Hills*

8:35 AM

CASE LAW UPDATE

- Support and imputation of income
- Premarital agreements
- Attorney fees and sanctions
- Fiduciary duty
- DOMA
-Support

Garrett C. Dailey, Esq., CFLS, AAML

*Attorney's BriefCase Legal Research
Software, Inc.
Oakland*

9:55 AM—Break

10:05 AM

MARITAL STANDARD OF LIVING

- Methodologies: income vs. expense analysis
- Dividing the dollars: how to allocate amongst family members?
- Children's expenses and allocation
- What to do with the residence?
- Impact of over or under spending: debt vs. savings
- When lifestyle is funded by an extraordinary work regimen

Monica Mazzei, Esq.

*Sideman & Bancroft, LLP
San Francisco*

Tracy Farryl Katz, Esq., CPA

*Gursey I Schneider LLP
Los Angeles*

The Honorable Hank M. Goldberg

*Superior Court of California
County of Los Angeles
Los Angeles*

**The Honorable Patrick J. Mahoney,
Retired**

*JAMS
San Francisco*

10:55 AM

INCOME FOR SUPPORT

- The age old question: what is income?
- Determining whether it is available for support?
- Phantom income: factors to consider
- Retained/distributable income
- Prerequisites

Stephanie M. Barnett, Esq.

*Jaffe and Clemens
Beverly Hills*

Darlene L. Elmore, CPA, ABV, CFF

*Darlene L. Elmore, CPA, ABV, CFF
Santa Rosa*

Los Angeles

The Honorable Thomas Trent Lewis

*Superior Court of California
County of Los Angeles
Los Angeles*

San Francisco

The Honorable Jeffrey Burke

*Superior Court of California
County of San Luis Obispo
San Luis Obispo*

11:55 AM—Lunch (lunch provided)

12:40 PM—Luncheon Speaker

TAXING SAME-SEX COUPLES: HOW ARE WE DOING WITH PERRY AND WINDSOR?

- DOMA: Is *U.S. vs. Windsor* retroactive?
- The affect of relocation on marriage

Donald H. Read, Esq.

*Law Office of Donald H. Read
Berkeley*



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1:15 PM

BEST PRACTICES FOR CASE MANAGEMENT

- Managing expectations
- Document management
- Strategy
- Deadlines
- Case costs
- Q&A

Moderator

Stephanie M. Barnett, Esq.

*Jaffe and Clemens
Beverly Hills*

Panelists

Bruce A. Clemens, Esq.

*Jaffe and Clemens
Beverly Hills*

Darlene Elmore, CPA, ABV, CFF

Santa Rosa

Tracy Farryl Katz, Esq., CPA, CFF

*Gursey I Schneider LLP
Los Angeles*

Monica Mazzei, Esq.

*Sideman & Bancroft, LLP
San Francisco*

2:05 PM

TAX STRATEGIES

- FATCA
- Carryovers and credits
- Filing 8332

Bruce A. Clemens, Esq.

*Jaffe and Clemens
Beverly Hills*

David W. Adams, CPA

*CBIZ Mayer Hoffman McCann P.C.
Los Angeles*

2:55 PM—Break

3:05 PM

FAIR COMPENSATION

- Family law
- Theories of measuring
- Sources
-Vetting
- Statistics
- Expert qualification
-How to present to court

Brandon Blevans, Esq.

*Blevans and Blevans, LLP
Napa*

Brian Boone, CPA

*Schultz Boone & Silva
Sacramento*

4:05 PM

PERSUASIVE PRESENTATIONS

- Judge's view: the good, the bad and the ugly
- Keep it simple, focused, and brief
- Good techniques for exhibits
- Common conflicts in terminology
- Two minute trial presentations

Donald Glenn, CPA

*Glenn, Dawson, Burak LLP
Walnut Creek*

Mark P. Gross, Esq.

*Brot & Gross, LLP
Sherman Oaks*

Los Angeles

The Honorable Mark Juhas

*Superior Court of California
County of Los Angeles
Los Angeles*

San Francisco

**The Honorable Glenn P. Oleon,
Commissioner (Retired)**

*ADR Sevices, Inc.
San Francisco*

5 PM—Adjourn

REGISTER ONLINE

www.calcpa.org

CONTACT

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FAX (888) 868-8558

WEB www.calcpa.org

EVENT PRICING

CONFERENCE REGISTRATION

Nov. 7, 2013 • Los Angeles Airport | 5131236A

Nov. 8, 2013 • San Francisco | 5131236B

Member \$349 | Nonmember \$479 | VP \$0 | Coupon \$0

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Nov. 8, 2013 • Webcast | 5131236C

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CalCPA Member \$669 | Nonmember \$999 (after Nov. 1, 2013)

Coupon 5 \$1,335 | Coupon 10 \$2,480

Learn more about discount programs (800) 922-5272 or www.calcpa.org/discount



Materials for this conference will be offered in PDF format. You will receive an email which contains a link for accessing the materials at least 3 days before the conference.

All registrations are taken on a first-come, first-served basis. The California CPA Education Foundation reserves the right to refuse admission to any individual whose behavior it deems inappropriate.

Cancellation Policy

If you need to cancel your registration, you must cancel four business days prior to the event to receive a full refund. After that time a refund will be given less a \$125 cancellation fee. No refunds will be given for no-shows.

VP80 and VP24 no-shows will have the number of registered CPE hours deducted from their VP80 credit.

Elearning pass no-shows will have the number of registered webcast hours deducted.

Coupon no-shows will forfeit the coupon used to register. For registration policies, please go to www.educationfoundation.org/policies

Note: Topics and speakers are subject to change. For up-to-date information, please go to www.educationfoundation.org



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