



Topic for this month:

All of the King's Men – the Multi-Family Office Team

Guest Speakers:

Susan K. Amster and Deborah S. McGee
WTAS

Monday, March 7, 2011

Cocktails – 6:00 p.m. Dinner – 6:30 p.m.

MCCORMICK & SCHMICK'S

206 North Rodeo Drive, Beverly Hills, California 90210 | 310.859.0434

About our speakers ...

Susan Amster consults with closely held businesses and wealthy families on income tax, charitable giving and succession planning. Susan has over 26 years of experience in managing the tax consulting and compliance needs of individuals, trusts, estates, exempt organizations and closely held businesses. Before joining WTAS, Susan was a Tax Partner in an international professional services firm in the Private Client Services practice. At that firm, she was a member of the firmwide advisory groups for exempt organizations and tax accounting methods. Susan is a contributing author of *Tax Economics of Charitable Giving*, currently in publication. She appears at tax institutes as a speaker on Individual Tax Planning. Susan has served as Chair of the Work and Family Issues Committee as well as the Women and Minorities in Leadership Task Force of the California Society of CPAs.

Deborah McGee has over 26 years of professional experience in providing finance and accounting services for clients, including numerous high-profile families, individuals, foundations, and businesses across a broad ranges of industries. She has extensive experience in the coordination, implementation and administration of finance and accounting systems. She assists clients in the initial establishment of family offices, and has led consulting projects for both operating companies and family offices to improve their processes, procedures and efficiency. Debbie serves as WTAS' firmwide leader of the Private Accounting Solutions Practice. She coordinates the activities of a team of professionals who serve the day-to-day financial accounting and controllership needs of high net worth individuals, families and their related closely held businesses, trusts, estates, and not-for-profit entities. Before joining WTAS, Debbie was a Partner in an international professional services firm, where she was in charge of the Accounting Outsourcing Practice for Southern California and led the Accounting Services Specialty Team serving family offices and closely held businesses.

Please R.S.V.P. AS SOON AS POSSIBLE
victoriya@lataxlawyer.com

Please note that we will need to know the following:

Who will attend – you or a substitute
Whether or not you plan to bring a guest

Guest Reservations – \$70.00 per person

Members are responsible for guest payment on or before the event

Victoriya Grinblat (assistant to Afshin A. Asher – Secretary, BHEPC)

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Telephone: 310.788.0444 | Facsimile: 310.788.0445 | www.LATaxLawyer.com