



TAX ISSUES IN DIVORCE MINI-CONFERENCE JAN. 28, 2015

PRESENTED BY THE EAST BAY CHAPTER LITIGATION COMMITTEE AND THE CONTRA COSTA COUNTY BAR ASSOCIATION

11:30 a.m.–1 p.m. Registration & Optional Lunch Presentation

How to allocate and divide quirky and/or incentive benefits and the associated tax consequences.

12:15–12:45 p.m. Cool Tech Gizmos and Gadgets
(no credit)
Hank Levy, The Henry Levy Group
Jeremy Calabro, Dawson CPA Firm

3–3:15 p.m. Break

3:15–4:15 p.m. Social Security, Medicare and Health Insurance for Divorcing Couples: Part II

Hazel Bright, HB Resources
Susan Mazzetti, Financial Advisor, Merrill Lynch

12:45–1 p.m. Break

1–1:45 p.m. Which of These Figures Do I Need? Understanding Tax Returns for Family Law

Leslie Dawson, Dawson CPA Firm
Jeff Stegner, Armanino

How to extract the figures needed for family law purposes from tax returns, K-1s, etc.

4:15–5:15 p.m. Stump the Experts

Beverly Brautigam, CPA, Brautigam & Co.
Hal Bartholomew, JD, Bartholomew & Wasznicky LLP
Questions and answers ... odds and ends.

1:45–3 p.m. To Divide or Not to Divide: Employment Benefits and Associated Taxes

Eileen Preville, Law Offices of Eileen Preville
Charlie Burak, Glenn and Burak

Date: Wednesday, Jan. 28, 2015

Credit Hours: CPE: 4.5 | MCLE: 4 | LS-TX: 4 | LS-FL: 4

Location: Crowne Plaza Concord;
45 John Glenn Drive, Concord

Objectives: Update family law practitioners on the latest issues affecting their clients and practice.

Cost: By Jan. 21: \$90/conference only;
\$110/conference and box lunch. After Jan. 21: add \$25.

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



CalCPA EB Chapter Divorce Mini-Conference

Wednesday, Jan. 28, 2015

RSVP: online at www.calcpa.org/EB; mail this form, with payment, to Soco Davenport; CalCPA; 1800 Gateway Drive, Ste. 200; San Mateo, CA 94404; fax to (650) 522-3052; call (925) 926-0189; or email soco.davenport@calcpa.org.

Name: _____ Phone _____ Email: _____

Name: _____ Phone _____ Email: _____

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Firm/Company: _____ Fax: _____

Address: _____ City, State, ZIP: _____

Check (Payable to CalCPA) Cardholder Name: _____

MC Visa AMEX: _____ Exp. Date: _____

No. of Participants: _____ X Cost per Person: _____ = Total Amount: _____

Meal Choice: Turkey Sandwich Vegetarian

All cancellations must be made 48 hours in advance. This is due to a contractual number guarantee which must be confirmed with the hotel, club or restaurant.



CalCPA

1800 Gateway Drive, Ste. 200
San Mateo, CA 94404

**Presented by the East Bay Chapter Litigation Committee and
the Contra Costa County Bar Association**

**TAX ISSUES IN DIVORCE
MINI-CONFERENCE
Thursday, Jan. 28, 2015**