

# CFO STUDY GROUP

BY INVITATION ONLY—[RSVP@SWENSONADVISORS.COM](mailto:RSVP@SWENSONADVISORS.COM)

CFOs and financial professionals are invited to attend this complimentary event hosted by Swenson Advisors. This is a quarterly lunch series established to deliver forward-thinking perspectives, fresh insights and networking among CFOs and Financial Executives. The CFO Study Group provides a forum to hear from speakers on topics relevant to CFOs while enjoying stunning views and lunch at the University Club Atop Symphony Towers.



**Tuesday, July 26, 2016**  
**University Club Atop Symphony Towers**  
**11:30am—1:30pm**

FEATURED TOPIC:

## **“Double Header”: The Status of the “Death Tax” and Using the New Crowdfunding Laws to Grow your Business**

Mr. Sullivan will give a summary of the latest estate transfer tax and key estate planning ideas to consider implementing into your estate plan.

Ever since the JOBS Act passed in 2012, mass confusion has existed regarding crowdfunding and how it gets done.

Ms. Sidoti will present the advantages and disadvantages of the new crowdfunding laws.

At its conclusion, you will know how your business can benefit from using crowdfunding financing options.

### FEATURED SPEAKERS:

#### **Philip J. Sullivan | Sullivan, McGibbons & Associates, LLP**

Philip J. Sullivan is a partner of Sullivan, McGibbons & Associates LLP. Mr. Sullivan's practice involves the representation of clients in estate planning, estate and trust administration, probate, estate and gift tax audits, and charitable planning. Mr. Sullivan has been recognized as a California “Super Lawyer” by Super Lawyers® magazine in the area of estate planning. Mr. Sullivan also has received the highest possible rating in both legal ability and ethical standards (“AV Preeminent”) from the Martindale Hubbell® peer review rating service. He is also a founding Board Member of the North County Estate Planning Council.



#### **Jillian Sidoti | Trowbridge, Taylor & Sidoti, LLP**

Jillian Sidoti specializes in transactional legal matters such as private placement memorandums, Form 10's, S-1's, Regulation D filings, trademarks, copyrights, NDA's, and contractual matters. Jillian also spends her time speaking at seminars educating real estate investors on how to legally raise capital for their real estate investment projects. Jillian also teaches Finance and Accounting for the BS and MBA programs at the University of Redlands, drawing on her experience as Financial Analyst, Controller, and CFO for many companies from manufacturing to real estate development.



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