



2011 Financial Bucket List

Why the Next 90 Days Matter

Wednesday, September 21, 2011

11:00 a.m. – 1:00 p.m.

Hyatt Regency La Jolla

3777 La Jolla Village Drive
San Diego, CA 92122

Lunch will be provided. Self-Parking is complimentary.

To register for the Roundtable,
please contact

**Meagan Hayes at 858-350-4215 or
mhayes@hwcpa.com.**

Online registration is also available at
www.hwcpa.com

Haskell & White's Roundtable Series is an interactive forum designed to help financial executives of Southern California public and private companies remain on the cutting edge of new developments in tax, SEC and accounting related rules and regulations.

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CERTIFIED PUBLIC ACCOUNTANTS
AND BUSINESS ADVISORS

If you are a business owner or C-suite executive, the next 90 days are critical if you hope to take advantage of some significant opportunities created by the 2010 Tax Act. While December 2012 may seem far away, now is the ideal time for all business owners to evaluate their estate plans in combination with their business plan to ensure all of your company's financial objectives are adequately addressed.

Please join us on September 21 to discuss strategies to lower your taxes and maximize the value of your company.

This interactive session will answer the following questions:

- What action items do I need to complete in the next 90 days?
- Is my business "investor ready"? What steps am I taking to create the most value in my business?
- Why might the down economy actually be to my advantage?
- Does my estate plan support my overall financial plan?
- For CFOs and CEOs working directly for a business owner, how can you help the business owner prepare a solid exit strategy?
- Does your estate plan take full advantage of the exemptions provided by the 2010 tax act?