



Succession Planning



Join us to discuss:

- Basic Planning • Business Planning • Valuations •
- Tax Considerations • Conflict Resolution •
- Family Communication • and much more... •

Date: Tuesday, September 27th

Time: 4pm - 6pm

Location: Ferguson Training Room, 190 Oberlin Avenue, Lakewood NJ

This workshop is free to all NJBA members

There will be a \$49 non-member registration fee

Space is limited to 40 attendees so you must RSVP

Please RSVP to christine@shorebuilders.org by Tuesday, Sept. 20th



Lynn A. Conover, CPA, CFBA, Partner, The Curchin Group

Lynn joined the Curchin Group in 1991 becoming a partner in 2003. For over 25 years, Lynn has provided an integrated suite of tax services that encompass consulting and compliance, financial advisory, tax and estate planning, business consulting, and personal wealth management. Her expertise in navigating the unique interplay of businesses has established her as a trusted advisor for succession planning and the process of transitioning businesses and wealth between generations. She works as part of a comprehensive team along with financial advisors and attorneys to provide plans that cover many aspects of planning for her clients.



Jeff Savlov, Founder, Blum & Savlov, LLP

Jeff grew up in his family's commercial printing business, proved himself in the corporate world and then studied family and group dynamics before training as a family therapist and psychoanalyst. He speaks, writes, and consults in the U.S and beyond and works with families sharing businesses (and other complex assets/investments) looking to continue their financial success while maintaining family harmony. He emphasizes the importance for enterprising families to be proactive when managing the mix of family and business.



Timothy J. Dengler, Shareholder, Giordano, Halleran & Ciesla

Tim focuses his practice on all aspects of trust and estate planning, estate administration, estate litigation and taxation. His clients include high net worth individuals and families with complex legal issues concerning retirement planning, wealth transfers, estate administration, fiduciary litigation and taxation issues. Tim formulates and implements complicated estate plans and serves as the administrator and/or trustee of wills, trusts and estates. Tim also advises principals in closely held businesses with regard to business succession strategies, the disposition of business interests and asset protection.