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FAMILY BUSINESS SEMINAR

Speaker Biographies

Exit Strategies for the Family Business

PRESENTED BY: ITAC (NY), NJMEP (NJ), BLANK ROME LLP, AND WEISERMAZARS LLP

Richard J. Bloom, CPA, PFS, MST
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Richard has more than 20 years of experience delivering specialized personal tax and financial planning services to high net worth individuals, including closely held business owners, executives, and hedge fund managers. He provides tax consulting; income and estate tax planning; federal, state and local tax compliance services; and representation before federal and state tax authorities for such individuals. Richard works with clients on multi-generational tax planning, philanthropic planning, wealth preservation strategies, and risk management.

Prior to joining WeiserMazars, Richard held senior executive positions at two prominent family office advisory firms and was National Leader of Trusts and Estates at a major accounting firm. He has over 17 years of Big 4 personal financial planning experience.

Richard is the Chairperson of the Private Client Service's Editorial Board, and has been quoted in various newspapers and magazines. He teaches on financial planning and tax issues and has published numerous professional and technical articles.

Richard received his Bachelor of Science in Accounting from the University of Delaware and his Master of Science in Taxation from Seton Hall University. He is a Certified Public Accountant in New Jersey, a Personal Financial Specialist and a licensed insurance advisor (Life, Accident, Health or Sickness and Variable).

Richard is a member of the American Institute of Certified Public Accountants – Personal Financial Planning Section and the New Jersey Society of Certified Public Accountants.

Marshall Calman, MBA (Princeton Only)
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Marshall lives in a world of possibility. But he's also a realist. And he's developed a knack for connecting the two—for turning ideas with potential into breakthrough results. That's why he's known as the guy you want to see when you're looking to increase leadership capacity, smash sales records, slay inefficiencies, or step up innovations.

Marshall is the founder and CEO of Calman Business Advisors. He was first trained in coaching methods while working in the rich counsel- and coaching-based culture at Hewlett-Packard. While moving up the ranks at HP, and later at Agilent Technologies, he became an executive, achieving breakthrough results based on more than 20 years in consultative and coaching-based leadership positions.

Marshall created and led HP's Professional Services Consulting practice for network solutions, and also led and grew some of the corporation's highest growth businesses. At Agilent, he led a global team for client support and consulting services. Marshall was fortunate enough himself to have had an executive coach. So unlike other coaches, he grasps from his own experience, the perspective of the client.

In private practice since 2004, Marshall mentors and coaches CEO's, business owners, executives and leadership teams. Some of the organizations Marshall has helped include; Verizon, Yahoo!, SunGard, Nokia, Bank of NY Mellon, Humana, Dreyfus, Amicus Therapeutics, Horizon Blue Cross Blue Shield , Grey Advertising, Weichert Relocation Services Inc., Havas Worldwide Health, Novo Nordisk, New York Weill Cornell Medical Center, Liquidnet, American Academy of Pediatrics, Brown-Forman and . . . yes, we could go on.

Marshall earned undergraduate degrees in electrical engineering and computer science and an MBA in marketing. He is a – business coach, leadership consultant, executive coach, sales trainer and ICF Professional Certified Coach (PCC).

Howard P. Dorman, CPA
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Howard has more than 30 years of professional experience providing accounting, tax, and consulting services to privately held companies and service firms. He primarily works with businesses operating in manufacturing & distribution with a concentration in the food & beverage sector. Howard is particularly adept at providing strategic planning guidance to owner managed businesses, especially those which are family-owned and operated. He assists clients in obtaining bank financing, navigating through complex merger and acquisition procedures, and management facilitation issues. Howard works with business owners to formulate succession and exit strategy plans that are most effective for both themselves and their businesses.

With a substantial background in Human Rights Reporting and Consulting Howard leads WeiserMazars' efforts in Social Reporting and Compliance. In collaboration with Mazars and Shift, the firm recently issued the UN Guiding Principles Reporting Framework, which is the first comprehensive guidance for companies to report on human rights issues in line with their responsibility to respect human rights. He is often featured in articles discussing the project.

An active professional in the New Jersey business community, Howard is a member of the American Institute of Certified Public Accountants and the New Jersey Society of Certified Public Accountants. He is a member of the Garden State Credit Association, the International Factor Association, the NJ Food Council and the Association of Food Industries. He currently serves on the Board of Directors of the Commerce and Industry Association of New Jersey and is the President of the Board of Directors of the Center for Holocaust Human Rights and Genocide Education Center which is located on the campus of Brookdale Community College. He received his BS from Fairleigh Dickinson University.

Jonathan H. Lander, Esq. (Princeton Only)
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Jonathan Lander has more than 25 years of experience in all matters related to estate and trust planning, including insurance, business succession, and tax matters. Mr. Lander has advised clients in complex planning issues, including Gift, Estate and Generation-Skipping Transfer Taxes.

Prior to rejoining Blank Rome, Mr. Lander served as leader of the PNC Wealth Management National Practice Group: Planning for the Business Owner.

Frederick D. Lipman, Esq.
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Frederick D. Lipman, a Harvard Law School graduate, is a senior partner with the international law firm of Blank Rome LLP, who has represented family businesses for more than 50 years, has been a member of a family business, and has lectured throughout the United States and internationally on family businesses. Mr. Lipman is the author of 17 books, including *The Family Business Guide: Everything You Need to Know to Manage Your Business from Legal Planning to Business Strategies* (Palgrave MacMillan, 2010) and *Valuing Your Business: Strategies to Maximize the Sale Price* (John Wiley & Sons, Inc., 2005). He has taught in the MBA program of the Wharton School of Business and the University of Pennsylvania Law School. Mr. Lipman is an internationally known authority on business law, has appeared on CNN, CNBC, Bloomberg, and Chinese television, and has been quoted in the *Wall Street Journal*, USA Today, Forbes, and other publications.

Edward Rosenfeld (New York Only)
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Ed is responsible for ITAC's business growth and transition services, which include Organizational Development, Marketing and Sales Team Development, Financial Controls and Reporting, Business Growth Planning, as well as the Family Business Advisor program.

Prior to joining ITAC, Ed was a family business consultant, assisting families with business growth, financial and succession planning, turnaround strategies and conflict management. He was previously the Chief Executive Officer of his family's furniture leasing and retail business, which he ultimately sold to Berkshire Hathaway. A serial entrepreneur, he has started and operated businesses in furniture leasing and retail, financial services, real estate, and energy conservation.

Ed is in demand as a speaker to business groups, taught at Rutgers University Business School and is a published writer. He has a Bachelor's and Master's degree in social science from Columbia University, and received mediation training through the Bar Association of the City of New York, the Center for Mediation in Law, and New York University. Ed is a Black Belt in Innovation Engineering and is certified as a Family Business Advisor by the Galliard Family Business Institute.

Susan Peckett Witkin (New York Only)
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Susan Peckett Witkin concentrates her practice in the areas of trusts and estates and tax law. She advises clients in a wide range of trust and estate matters, including:

- estate planning
- estate and trust administration
- litigation

Additionally, Ms. Witkin provides tax and related advice to individuals and privately held companies in areas such as:

- intergenerational transfer tax planning
- business succession
- insurance
- entity formation and management
- charitable giving arrangements
- private foundations
- estate and tax planning for foreign individuals and trusts
- tax controversies and FBAR and FATCA compliance
- distribution planning for IRAs and qualified plans

- income tax planning with trusts
- trust companies
- fiduciary duties

She also advises clients regarding pre- and post-nuptial agreements and tax and property issues relevant to divorces and separations.

Ms. Witkin is an adjunct professor of law at New York University School of Law and previously taught as an adjunct professor of law at St. John's University School of Law.

Ms. Witkin served for many years as a chair of various committees of the American Bar Association's Section of Real Property, Probate and Trust Law (now the Section of Real Property, Trusts and Estates Law), including the Estate and Gift Tax Committee, the Marital Deduction Committee and the Lifetime Transfers Committee. She also served on the Section's Nominating Committee. Recently, she was one of the principal authors of the April 2012 report of the NYSBA's Tax and Trusts and Estates Law Sections titled "Report on Notice 2011-101: Request for Comments Regarding the Income, Gift, Estate and Generation-Skipping Transfer Tax Consequence of Trust Decanting," providing the Internal Revenue Service with a response to its requests for comments on various tax issues implicated in the decanting of trusts.

She is currently an active member of the New York City Bar Association's Animal Law Committe, focusing on legal issues of animal welfare and management, rights of individuals to have support animals in various settings, and the ethical treatment of animals in agriculture, among others.

She has written and co-authored articles for various publications, including the New York Law Journal and the University of Miami Philip E. Heckerling Institute on Estate Planning, and has authored and co-authored several chapters of Murphy's Will Clauses.

Ms. Witkin has been a lecturer and moderator at American Bar Association and Practicing Law Institute programs, and has presented programs to various groups, including attorneys, accountants, clients and their advisors, women entrepreneurs, and to entrepreneurs in the healthy living space.