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CINCINNATI CHAPTER presents

As President Elect and Membership Chair of the Cincinnati Chapter Society of Financial Service Professionals, I would like to personally invite you to attend our upcoming meeting on April 18th.

We will host a live panel of local speakers Michael Kinzie, of Integrated Financial Network, Deborah Miner, of Columbus Life, and William (Bill) Hesch of Hesch CPA and Law Firm. This panel will present a Case Study: Navigating the Complex Issues of the Closely-Held Business.

I hope to see you there!

Best regards,
Michael

Michael Comperchio, CLU®
ULTROVA WEALTH RESOURCES
Email: mcmcomperchio@gmail.com

Case Study: Navigating the Complex Issues of the Closely-Held Business

Family owned businesses require advisors to coordinate the clients' financial, estate and business succession considerations.

REGISTER NOW!

Tax reform adds another layer of complexity, as business owners look at new tax rates, changes to the estate tax, and the temporary status of several of the new laws.

Don't miss this 90-minute presentation by a panel of local experts, including an attorney, a CPA and an experienced financial planner, giving you the chance to ask questions and see how each professional discipline contributes to a team approach.

EVENT DETAILS

Date:

Wednesday, April 18, 2018

Location:

**Northwestern Mutual Building
3rd Floor Conference Room**

3805 Edwards Road
Cincinnati, OH 45209 [Directions](#) .

Time:

8:00am Networking & Coffee/Bagels
8:30am Program
10:00am Adjourn

Registration:

Cinti & Dayton Members - \$10.00
Non Members - \$25.00
Season Pass Holders - No Charge
Prospective Member (Guest) - Free*
**FSP Members may bring a prospective member free (first time attendance only).*

[Click Here to Register](#)

*Deadline to Register: **April 16, 2018***

Continuing Education Credits:

**CE Pending Approval: CFP | CPA |
OH/KY CLE | OH/KY Ins.**



Michael Kinzie

ABOUT THE SPEAKERS:

Michael R. Kinzie, CLU, ChFC, CASL, LUTCF
Chartered Financial Consultant
Integrated Financial Network

With more than 30 years of experience in the financial services industry, Michael excels at helping individuals and businesses create an integrated plan to achieve their financial goals. Specializing in Wealth Accumulation, Retirement and Pension Distribution planning, he believes the key to financial success comes from working with a sound financial advisor who focuses on your monetary objectives, manages risks, and provides you with first-class products and services. Michael prides himself on a warm and professional approach to the practice of financial planning: he is a wonderful listener, and he is able to explain the financial planning process with both clarity and expertise.

Michael has received many awards and recognition for his advisory work including the David H. Brogan Award, Paul E. Martin Community Service Award and the Cincinnati Association Insurance & Financial Services Advisors Hall of Fame. His Civic and Charitable Affiliations also include MDRT Foundation, Boy Scouts of America and Tri-State Warbird Museum Sponsor.

Deborah A. Miner, CLU, ChFC, JD
Assistant Vice President
**Advanced Markets for Columbus Life and Western &
Southern Financial Group Distributors**



Deborah provides training and assistance on advanced [Deborah Miner](#) markets concepts, including retirement distribution planning, trust planning, estate, income, and gift tax planning, wealth accumulation, preservation, and distribution planning and business planning.

She has been writing and communicating about advanced planning topics for more than 20 years. Miner was Editorial Director of the Tax and Financial Planning group at the National Underwriter Company from 1991 to 2010. She wrote and edited many sections of Tax Facts and edited Stephan R. Leimberg's Tools & Techniques series and Donald F. Cady's Field Guides. She also spent several years as a Senior Advanced Sales Consultant for a Midwestern life insurance company and as president and owner of her own advanced markets consulting business.

She holds a bachelor's degree from The Ohio State University and a law degree from The Ohio State University College of Law. She is also a Chartered Financial Consultant (ChFC) and a Chartered Life Underwriter (CLU).



[Bill Hesch](#)

William E. Hesch, Esq., CPA, PFS

William E. Hesch CPAs, LLC, William E. Hesch Law Firm, LLC

William E. Hesch, Esq., CPA, PFS has over 40 years of CPA experience and over 25 years of legal experience in Cincinnati. He manages William E. Hesch CPAs, LLC, which is supported by three professional staff who work with business owners to minimize their taxes and assist as a financial and business advisor. He focuses his CPA practice in the areas of estate and income tax planning, pension planning, business valuations, succession planning, and buy/sell agreements for business owners. He is one of only approximately 5000 CPAs in the country who is a Personal Financial Specialist (PFS). He is one of only a few practicing attorneys in Cincinnati who are also a CPA/PFS and one of only 50 CPA/PFSs in a 50 mile radius of Cincinnati.

Bill manages William E. Hesch Law Firm, LLC, which is supported by three professional staff. His law firm focuses in the areas of estate planning, elder law planning and issues, probate and estate administration, the purchase and sale of businesses, and business owners needing partnership or shareholder operating agreements, employment contracts, leases, and buy/sell agreements. In 2005, Cincy Magazine, first recognized Bill as one of only 63 "Leading Lawyers" in the Northern Kentucky/ Cincinnati area, and, in 2018, he was named for the fourteenth consecutive year as a "Leading Lawyer" in the Trust & Estate area. Check out his websites at heschcpa.com and heschlaw.com and contact him directly at 513-509-7829 or bill.hesch@williamhesch.com.

UPCOMING MEETINGS

Mark your calendar to attend all the Cincinnati Chapter Meetings.

SAVE
THE
DATE!

DATE	TOPIC	SPEAKER
May 16	VTC: Helping Clients Successfully Integrate Charitable Giving into Succession Planning	Moderator: Robert B. Wellendorf II, CLU, AEP, CAP Panelists: Randy A Fox and Laura J. Malone, CAP, CEPA
June TBA	Social Event	More info Coming Soon!

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