

Monthly Webinar Series Courtesy of Gassman, Crotty & Denicolo, P.A.

Coordinating Business Conduct, Contractor Relationships and Insurances

Tuesday, June 20, 2017

12:30 p.m. to 1:00 p.m.

Presented by: Chuck Wasson, Brandon Ketron & Alan S. Gassman



Chuck Wasson, CPCU, CIC
chuck@arcwinsurance.com



Brandon Ketron, J.D., LL.M.
brandon@gassmanpa.com



Alan S. Gassman, J.D., LL.M.
agassman@gassmanpa.com

GASSMAN, CROTTY, & DENICOLO, PA
ATTORNEYS AT LAW

Upcoming Webinar Series Calendar for Business Law and Strategies For Business Owners and Professionals

SERIES 5 7/25/17-Creditor Protection Planning for the Professional Practice or Operating Business

SERIES 6 8/15/17-The Art and Science of Negotiating Agreements with David Finkel

SERIES 7 9/26/17-Negotiating the Purchase and Sale of a Business with John McDonald of Hyde Park Capital

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SERIES 9 11/21/17-Uses and Abuses of Independent Contractor Arrangements

SERIES 10 12/19/17-Income Tax Strategies and Compliance Aspects of Business Planning

*Free 30-Minute Webinars Courtesy of Gassman, Crotty & Denicolo, P.A.
For more information email: agassman@gassmanpa.com*

Chuck Wasson Bio



chuck@arcwinsurance.com

Chuck Wasson has been active in the insurance industry for over twenty years, starting as an insurance adjuster at Sarasota's Johns Eastern Company, to his current position as President at ARCW Insurance. He firmly believes that an insurance agency must deliver on their promises and has incorporated the successful policy of "doing what we say we'll do." In addition to that tenet, he takes the advisory approach with his clients and as a result has developed a deep level of customer loyalty.

Wasson Insurance began as Sandy Wasson & Associates Insurance, Inc. and was created by Chuck's mother in 1989 as a family owned and operated insurance agency. Chuck joined the family agency in 1992 and just recently changed the name to ARCW Insurance.

The philosophy of the agency is the same today as when it first opened in that their primary goal is to give their clients the best insurance advice possible. Even if that means turning down business by telling potential clients that their coverage and current carrier is the best place for them to be. It's that attitude of honesty and integrity that has built the agency's reputation as being one of the best around.

Over the years, Chuck has developed a corporate philosophy of understanding that the insurance they sell can be purchased from a number of different agencies or outlets. For that reason alone, ARCW Insurance has strived to be different from the rest by being the one-stop shop for all insurance needs both commercial and personal.

Chuck graduated from the University of Florida in 1988 and attained the Chartered Property Casualty Underwriter (CPCU) designation in 1998. In 2007, he was given the designation of Certified Insurance Counselor (CIC).. Chuck, his wife Wendy and two daughters, Sarah and Rebecca, enjoy family cruises together whenever possible.

Alan Gassman Bio

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agassman@gassmanpa.com

Alan S. Gassman, J.D., LL.M. is a board certified estate planning and trust lawyer who practices in Clearwater, Florida. He has an LL.M. in taxation from the University of Florida, and practices in the areas of trust and estate planning, business and medical practice representation, taxation, wealth preservation and has represented well over 1,000 physicians for the last 28 years.

Mr. Gassman speaks for many tax conferences and national programs, including over 15 Bloomberg BNA webinars in the past 4 years, 3 times at the Notre Dame Tax and Estate Planning Institute in the past 2 years, and at many other national and Florida Bar conferences.

He was the lead author on Bloomberg BNA's Estate Tax Planning for 2011 and 2012, and is the author of several other books, including Gassman & Markham on Florida and Federal Asset Protection Law, Creditor Protection for Florida Physicians, and A Practical Guide to Kickback and Self-Referral Laws for Florida Physicians. He has been published multiple times in Medical Economics and has been quoted on numerous occasions in Modern Healthcare, the Wall Street Journal, the New York Times and many other publications.

Brandon Ketron Bio

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brandon@gassmanpa.com

Brandon Ketron J.D., LL.M. is an associate at the law firm of Gassman, Crotty & Denicolo, P.A. and practices in the areas of Estate Planning, Tax, and Corporate and Business Law.

Brandon graduated from the University of Florida where he received his LL.M. in Taxation. He received his JD from Stetson University College of Law and graduated cum laude. He received his undergraduate degree from Roanoke College where he graduated cum laude with a degree in Business Administration and a concentration in both Accounting and Finance.

Brandon is licensed to practice law in the State of Florida and is a licensed CPA in Florida and Virginia.

Florida Medical Marijuana Law - What Physicians and Their Patients Need to Know

With Special Guest Lester Perling

*FREE WEBINAR COURTESY OF GASSMAN, CROTTY & DENICOLO, P.A. and
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Please register soon as space is limited.



Lester Perling

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Alan Gassman

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Thursday, June 29, 2017

12:30 PM EST

Lester Perling and Alan S. Gassman

For more information, please contact Alan at

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UPCOMING BLOOMBERG BNA ESTATE PLANNING TALKS



Edwin Morrow



Christopher Denicolo

IRA Planning Opportunities and Pitfalls
Presented by Edwin Morrow & Christopher Denicolo

July 12, 2017 // 12:30 – 1:30 PM EST



Jerome Hesch



Joy Spence

**Business Succession Planning Techniques: Passing the Business on Fairly to Family and/or Employees
Using Income Tax and Investment Smart Methods.**

Presented by Jerome Hesch & Joy Spence

July 19, 2017 // 12:30 – 1:30 PM EST

Email: agassman@gassmanpa.com for more information

Moderated by
Alan S. Gassman





Join us

FOR A SPECIAL COMPLIMENTARY PRESENTATION

Monday, August 21, 2017

4:00 p.m. to 6:00 p.m.

Johns Hopkins All Children's Education & Conference Center

701 4th Street South, St. Petersburg, FL 33701

Includes a 300+ Page Course Book

Martin M. Shenkman and Alan S. Gassman

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Two Hours of Legal & CPA CLE Credit Awarded

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FOR A SPECIAL CONTINUING EDUCATION PRESENTATION FOR
LAWYERS, CPA's, TRUST OFFICERS, AND OTHER PROFESSIONALS

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Tuesday, October 17, 2017

Klingenstein Jewish Center

580 McIntosh Rd,
Sarasota, FL 34232

Jerome M. Hesch and Alan S. Gassman

| | |
|--|-----------------|
| Prof. Hesch on Charitable Planning Techniques | 4:00 PM—4:50 PM |
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BLOOMBERG BNA'S 2017 ESTATE PLANNING WEBINAR SERIES

| TOPIC | SPEAKER | DATE |
|---|--|--------------------|
| IRA Planning Opportunities And Pitfalls | Edwin Morrow Christopher J. Denicolo | July 12, 2017 |
| Business Succession Planning Techniques: Passing the Business on Fairly to Family and/or Employees Using Income Tax and Investment Smart Methods. | Jerome Hesch Joy Spence | July 19, 2017 |
| Sophisticated Asset Protection Trust, Offshore LLC And Related Planning | Jonathan Gopman | August 9, 2017 |
| A Comprehensive Checklist For Succession Planning | Turney Berry Clary Redd | September 13, 2017 |
| The Most Common Challenges We See From The IRS, And How To Avoid Them | John Porter | October 4, 2017 |
| Essential Non-Tax Planning Considerations For Sophisticated Estate Plan | Martin Shenkman | November 1, 2017 |
| Tax Planning for Marriage and Divorce | Carlyn McCaffrey Nicole Pearl Jerome Hesch | November 8, 2017 |
| Planning To Reduce Medicare And Self-Employment Taxes In Business, Investment, And Trust Structuring – 6 Structures That Can Be Used. | David Kirk | December 13, 2017 |

Employment Related Exposures

- Employment Practice Liability (EPLI)
 - *All employers have this exposure*
 - Sexual Harassment
 - Wrongful Termination
 - Religious discrimination
 - *Wage & Hourly claims*
 - *3rd Party Exposure*



Business Insurance

- Hired & Non-Owned Auto
- Spoilage coverage
- Loss of Income
 - *Extra Expense Coverage*



Insuring Vehicles: Personal vs Commercial

- Cost Differences
- Permissible Drivers
- Corporate vehicles on a Personal Auto Policy



Workers Compensation

- Independent Contractors
- Excluding Owners/Officers
 - *Exemptions effective 1/1/2013 and later are valid for a period of 2 years.*
 - *Included owners are capped at an annual salary of \$130,000 for rating purposes.*



Cyber Liability

- Not Just computer hacking
 - *Mismanagement of Personal Information*
 - *Credit cards*
 - *Lost/stolen cellphones/laptops*



Building Coverage

- Adequate valuations for reconstruction
 - *Not market or assessed value*



Hurricane Season

- Inventory
- Pictures/Videos
- Review all coverages now
- Flood-30 day wait



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