

DINNER MEETING + 2 CPEs

Wednesday, December 8, 2010

5:00 pm Networking 6:00-8:00 pm Dinner and Speaker

Fratello's Ristorante, Manchester, NH

Tax Update and Estate Planning

Speakers: John Weaver, CPA
Senior Tax Manager

William Enck, CPA
Retirement Plan Group

Our December meeting is our annual tax update supplemented this year by some key updates regarding retirement plan rule updates and overall retirement planning concepts. Tax updates will address major changes as well as strategies for year-end or future tax planning to protect both personal and company assets from the tax man.



John Weaver, CPA, is a Senior Manager Berry Dunn's Tax Services Group. His experience is primarily in business and individual taxation, specializing in smaller and medium-sized closely-held companies and partnerships. During his career, he has provided services to manufacturers and distributors, wholesalers and retailers, financial service providers and investment partnerships, professional service organizations, technology companies, construction and real estate businesses, and others. His experience also includes multistate and international tax issues.

Before joining BDMP in 2008, John was a tax partner at UHY Advisors in Boston. Prior to his career in accounting, John was a manager with a well-known national retail organization.



Our second speaker this evening is William G. Enck. Bill is a member of BDMP's Retirement Plan Solutions Group. He provides plan design, administration and consulting services for qualified and nonqualified retirement plans, 403(b) plans, and deferred compensation plans as well as various types of welfare and flexible benefit plans. Bill understands IRS and DOL correction programs, represents clients in these examinations and speaks and writes on employee benefits.

Bill is the leader of consulting and administration practices of the Retirement Plan Solutions Group. In addition to being a CPA, Bill is an Accredited Pension Administration (APA). Before joining BDMP, Bill managed the Portland office of a regional third party administrator.