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## **HASKELL & WHITE “FINANCIAL BUCKET LIST” ROUNDTABLE OUTLINES Q4 GROWTH OPPORTUNITIES IN M&A, ESTATE PLANNING**

**IRVINE, Calif. – Oct. 12, 2011** – The next 75 days are crucial for businesses and high net worth individuals looking to take advantage of opportunities within the current tax legislation, according to the latest roundtable series by Irvine-based Haskell & White LLP, one of Southern California’s largest independently owned accounting, auditing and tax consulting firms. The September 21 program entitled “Financial Bucket List” outlined available estate planning and business strategies designed to reduce taxes and maximize business value in the final quarter of 2011.

“The recent legislative tax changes have provided an unprecedented historical opportunity to gain additional value through M&A activity as well as the benefits of advanced estate planning,” said Wayne Pinnell, Managing Partner of Haskell & White. “This discussion outlined in detail the strategies and tactics necessary to begin 2012 positioned for financial growth and security.”

Key points discussed in the presentation included the following:

- Preparing an exit plan and key steps in selling a business, including tactics employed to make the business “investor ready.”
- Businesses’ strategies for turning the current economic climate into an advantage by using the reduced real estate and business values for estate and gift planning considerations.
- Capitalizing on the available wealth transfer opportunity utilizing the temporary \$5 million lifetime gift exclusion provided by the 2010 Tax Act before it expires at the end of 2012.

The roundtable discussion was facilitated by Pinnell, in collaboration with Haskell & White's Corporate Tax Partner, Gary Curtis and Director of Advanced Estate and Gift Taxation, Marisa Alvarado.

Launched in 2008, Haskell & White's Roundtable Series is designed for financial executives of Southern California public and private companies as a forum to stay on the cutting edge of developments at the SEC and emerging trends in financial reporting. The series will continue in December with roundtable sessions scheduled in Irvine and San Diego.

"Haskell & White maintains a strong commitment to the Southern California business community, and our Roundtable Series is one example of the firm's dedicated effort to support the community of financial executives by providing a forum for networking and presenting information on current topics of interest," said Pinnell.

For information on future Haskell & White roundtables, please contact Meagan Hayes at (949) 450-6249.

#### About Haskell & White LLP

Haskell & White LLP is one of the largest independently owned accounting, auditing and tax consulting firms in Southern California, servicing public and private middle-market companies. With locations in Irvine and San Diego, Haskell & White combines the expansive services, knowledge, experience and reach of national and international accounting firms with the personal attention, responsiveness and value of a local organization. Haskell & White works with companies in a broad range of industries including real estate, manufacturing, distribution, life science, technology, and retail. The firm provides solid expertise and services to its clients in the tax and audit disciplines, including advising SEC registrants and consulting on mergers and acquisitions. Further information on Haskell & White can be found on the firm's website, [www.hwcpa.com](http://www.hwcpa.com).

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