



AMERICAN COMMITTEE FOR THE  
**WEIZMANN**  
INSTITUTE OF SCIENCE

SCIENCE FOR THE BENEFIT OF HUMANITY



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## **ESTATE TAX PLANNING IN THE NEW ECONOMY**

**THE WEIZMANN INSTITUTE OF SCIENCE** in Rehovot, Israel, is one of the world's top-ranking multidisciplinary research institutions. The Institute's 2,700-strong scientific community engages in research addressing crucial problems in medicine and health, energy, technology, agriculture, and the environment. Outstanding young scientists from around the world pursue advanced degrees at the Weizmann Institute's Feinberg Graduate School. The discoveries and theories of Weizmann Institute scientists have had a major impact on the wider scientific community, as well as on the quality of life of millions of people worldwide.

**THE AMERICAN COMMITTEE FOR THE WEIZMANN INSTITUTE OF SCIENCE** is a community of dedicated people who share a common vision in support of the Institute. The generous assistance the Institute receives from individuals, foundations, and corporations is vital for its future. Committee members show their devotion to the advancement of the Institute's goals by becoming partners in the search for answers to the most difficult challenges facing humanity.

## **American Committee for the Weizmann Institute of Science Southern California Region**

**John L. Schwartz, MD**  
*Chairman*

**Janis Rabin**  
*National Vice President and Executive Director*

**Bella Simon Cayne**  
*Director of Development*

**Stephanie Horsley**  
*Program Coordinator*



SCIENCE FOR THE BENEFIT OF HUMANITY

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## Moderator



**JOHN L. SCHWARTZ, MD**  
*Chairman, Southern California Region*  
American Committee for the  
Weizmann Institute of Science

## Panelists



**MICHAEL FREDLENDER**  
*Managing Director*  
Provident Financial Management  
"All in the Family: Funding  
Your Philanthropic Goals"



**JEFF HORN**  
*Senior Vice President*  
The Schwarz Group at  
RBC Wealth Management  
"Hot Topics with Municipal Bonds"



**ANDREW KATZENSTEIN, ESQ.**  
Proskauer Rose LLP  
"State of the Estate Tax"



**STEVEN L. MEYERS, PhD**  
*Vice President for Planned Giving*  
American Committee for the  
Weizmann Institute of Science  
"Personalized Philanthropy"

OUR GUEST SPEAKERS

# AMERICAN COMMITTEE FOR THE WEIZMANN INSTITUTE OF SCIENCE

*cordially invites you  
to be our guest for brunch  
and to hear about*

## **Estate Tax Planning in the New Economy**

Friday, June 3, 2011

Brunch

10:00 a.m. – 12:00 p.m.

The Peninsula Beverly Hills  
9882 South Santa Monica Boulevard  
Beverly Hills

For information and to RSVP, call 424.442.1000  
or e-mail [LA@acwis.org](mailto:LA@acwis.org)

Validated Parking

There will be no solicitation of funds

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The American Committee for the Weizmann Institute of Science is pleased to thank the following for graciously underwriting this program:

- Michael Fredlender and Provident Financial Management
- Andy Katzenstein, Esq and Proskauer Rose LLP
- Lon Morton and Morton Capital Management
- Don Schwarz and The Schwarz Group at RBC Wealth Management

# ABOUT OUR GUEST SPEAKERS

## **JOHN L. SCHWARTZ, MD**

John L. Schwartz, MD and his wife, Vera, have three grown children and three grandchildren. After successfully practicing medicine for 14 years, Dr. Schwartz entered the tradeshow and publishing business. He sold his firm in 1999 to the largest tradeshow producer in the world. Since then, he has invested in stocks, real estate and private equity. He is currently CEO and Co-Founder of the Value Investing Congress, a semi-annual meeting for hedge fund managers and high net worth individuals.

## **MICHAEL FREDLENDER**

Michael is a Managing Director and in charge of the tax practice with Provident Financial Management, a business of RSM McGladrey. He has over 30 years of corporate and public accounting experience serving clients in a variety of industries, including entertainment, real estate, health care, manufacturing, distribution, retail, banking, and security broker dealers. Prior to joining Provident Financial Management, he had established his own firm, and before that for almost 17 years, Michael was a tax partner at a Big 4 accounting firm where he was the area director for the Pacific Southwest Personal Financial Counseling practice also serving on the firm's National Family Wealth Planning Committee. He has supervised or prepared numerous valuations of fractional ownership interests in closely held partnerships or corporations. Michael is a member of the American Institute of Certified Public Accountants, the California Society of Certified Public Accountants. He was a member of the AICPA Estate and Gift Tax Committee from 1990 to 1993 and the Estate Counselor's Forum of Beverly Hills. Michael received his Bachelor of Science from California State University, Los Angeles in 1980 and holds his CPA license in California.

## **JEFF HORN**

Jeff is Senior Vice President for Investment at the Royal Bank of Canada. He has 33 years of experience in the financial industry and is a member of The Schwarz Group — a six-person team within the RBC Wealth Management system that helps to manage over \$400 million of client assets. He has worked for over 20 years as a municipal bond trader and also ran Drexel Burnham Lambert's west coast municipal bonds department. Other past firms he has worked with include Smith Barney,

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## ABOUT OUR GUEST SPEAKERS

Schroders, and Crowell Weedon. Jeff is a past president of the Los Angeles Municipal Bond Club, a past board member of the California Public Securities Administration, and a member of the Board of Governors for City of Hope. He graduated from University of California at San Diego in 1979 with a Bachelors Degree in Economics.

### **ANDREW M. KATZENSTEIN, ESQ.**

Andy is a partner at Proskauer Rose LLP, practicing out of the Los Angeles office. Andy's practice involves estate, gift, and generation-skipping tax planning, income tax of trust planning, charitable tax and administrative matters, probate and post-death administration of living trust matters, and fiduciary litigation. He graduated from the University of Michigan in 1979 with high honors, and received his J.D. from the University of Michigan Law School in 1982 with distinction. In 1990, Andy received his LL.M in Taxation from the University of San Diego School of Law. Andy currently teaches Estate and Gift Tax at USC Law School, and taught Estate and Gift Tax previously for 18 years at UCLA School of Law. He has also taught at the University of San Diego and Golden Gate University LL.M. programs. Andy is a member of the California and New York State Bars. He can be reached at [akatzenstein@proskauer.com](mailto:akatzenstein@proskauer.com) or 310-284-4553.

### **STEVEN MEYERS, PhD**

Steve has been Vice President for Planned Giving at the American Committee for the Weizmann Institute of Science since 1995 and is a member of its management team and total financial resource development strategy group. He holds a Masters Degree in Organization and Management from Antioch University and a PhD from the University of Buffalo. Steve has published in the Journal of Gift Planning and speaks frequently at gift planning roundtables on donor-centered giving and "Planned Giving in the Big Picture." Steve is a principal developer of personalized philanthropy, a full spectrum practical approach for integrating current and future gifts, enabling donors to have greater philanthropic impact. He also developed best practices for transparently reporting fundraising achievement in multiple dimensions, widely adopted by charitable organizations. Steve strongly believes in building a pioneering culture of teamwork and collaboration and most enjoys helping donors realize ways they can help make miracles happen at the Weizmann Institute and other organizations close to their hearts.

