



CPA • LAW SOCIETY OF VENTURA COUNTY



THE EAST VENTURA COUNTY CHAPTER

PRESENTS:

“Roles and Responsibilities in a Residential Real Estate Transaction: What’s Yours?”

Presented by

Richard M. Hoefflin, Esq. and Jason M. Burrows, Esq.

November 21, 2008, Friday, 12:00 - 1:30 p.m.

Westlake Village Inn

31943 Agoura Road, Westlake Village, CA 91361

818.889.0230, www.westlakevillageinn.com

PLEASE RSVP

**CONTINUING
EDUCATION**

SPEAKERS



Richard (Tag) Hoefflin has been representing individuals and businesses, primarily in real estate and business litigation, for more than 33 years. His degree in Accounting from CSUN, having been raised in the Fernando Valley, and then moving to Westlake Village in the early 70's, have provided him with a unique perspective and extensive experience in real estate and business matters in the San Fernando and Conejo Valleys. He graduated from Loyola University School of Law, Los Angeles in 1974. Mr. Hoefflin has extensive trial and arbitration experience; he has handled many related appellate matters, including his successful argument before the California Supreme Court (*Ridgley v. Topa*). Mr. Hoefflin founded his present firm, Hoefflin & Associates, in Westlake Village, in 2000. Mr. Hoefflin is the former co-chair of the San Fernando Valley Bar Association, Business and Real Estate Section.



Jason Burrows has been practicing law for over ten years throughout Southern California and Las Vegas, Nevada. Prior to joining Hoefflin & Associates, ALC, Mr. Burrows represented individuals and various businesses in the areas of business litigation, professional liability, employment law, risk reduction/management, construction defect litigation, insurance coverage and estate planning and litigation. Since joining Hoefflin & Associates, ALC, Mr. Burrow's practice is focused on real estate and business litigation on behalf of clients in Ventura and Los Angeles Counties.

He has a degree in Business Administration - Finance from CSU, Northridge and obtained his law degree from Southwestern University School of Law in Los Angeles.

**CPAs/Attorneys:
1.0 Hr CPE/MCLE**

This activity has been approved for Minimum Continuing Legal Education credit by the State Bar of California in the amount of 1.0 hour. VCBA certifies that this activity conforms to the standards for approved educational activities prescribed by the rules and regulations of the State Bar of California governing MCLE. Additionally, this organization follows the CE requirements specified in the California Board of Accountancy Regulations.

PRESENTATION

What issues should you consider when you are asked to advise your clients in connection with the purchase or sale of residential real property? What role should the CPA have? What role should the Attorney have? What is the CPA, Attorney and Client's respective responsibilities? For example: who should advise how title is held (e.g. community property, joint tenancy, trust, LLC, or a combination thereof)? How about financing and lending decisions; short sales; income tax implications; title insurance and homeowner coverage; real property tax issues. What about the required disclosures on the Transfer Disclosure Statement, and the buyer's duties of investigation? What can you do to protect your client and yourself from potential adverse consequences? Messrs. Hoefflin and Burrows will discuss various roles and responsibilities in residential real estate transactions and will highlight key issues for you to consider. It will be informative and insightful, whether you are buying or selling your own home, or advising your clients in these transactions.

RESERVATIONS

Price includes Lunch, Coffee/Tea, Dessert and 1 hour of MCLE/CPE credit. The cost is \$35 for members of the CPA/Law Society and \$45 for non-members. Please make checks payable to "CPA/Law Society of Ventura County" and mail to Hemming Morse, Inc., 31365 Oak Crest Drive, Suite 250, Westlake Village, CA 91361. **Please make your reservations and lunch selection** by email to cpalaw@hemming.com by November 19, 2008. Please call Sheila Ingram at 213 228-8180 if you have any questions.

LUNCH CHOICES

Oriental Ginger Salad:
Chopped Greens, Wontons, Almonds, Mandarin Oranges, Green Onion, with a Sesame Ginger Dressing and Topped with Soy Marinated Chicken

Char-Grilled Atlantic Salmon:
With a Lemon Chile Aoli Sauce with Herbed Risotto and Vegetables

Vegetarian Alternative:
House Choice

(PLEASE SELECT ONE)