



# GREATER NEW JERSEY ESTATE PLANNING COUNCIL, INC.

215 GODWIN AVENUE, #33  
MIDLAND PARK, NJ 07432  
[www.GNJEPC.org](http://www.GNJEPC.org)

Please join us for our presentation and lunch:

## The Ultimate in Planning for the Business Owner-Client

**Speakers: Peter Dolgoff and John Canavan**

Please join the **Greater New Jersey Estate Planning Council** on  
**Wednesday, January 17, 2018, at Bacari Grill in Washington Township, NJ.**

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Very often professionals – and our clients as well – are looking for the proverbial “silver bullet” in planning. Many feel this is akin to searching for a “pink unicorn” so to speak. However, for many, it is not. What if you could talk to your business owner clients about the ultimate planning strategy – one that allows a client to accumulate and access wealth on the most tax favorable basis, obtain current and future tax deductions, and provide maximum benefits for the client? We are very excited to have none other than Peter Dolgoff and John Canavan present on the ultimate in business planning for our business owner clients – The Dolgoff Plan™. This planning technique, in its simplest form, is a retirement plan – but unlike one you’ve ever seen before. It is completely discriminatory – meaning, do it for the business owner only, the business owner and his/her business partner, a very important, key employee, or a group of people – whatever and whoever you like. In addition, it provides current and future tax deductions, as well as tax benefits for accumulation and distribution. Even more importantly, this planning technique can also be used in numerous other ways – for business succession planning, buy-sell planning, golden-handcuffs/key-person, estate planning and charitable planning in a highly tax advantaged manner.

While the Dolgoff Plan™ is far from new, very, very few professionals are aware of it and even far fewer have ever used it. Developed by well-known accountant, Ralph Dolgoff, CPA, in 1960, today, his son Peter Dolgoff, President of the Dolgoff Plan Corporation, is the exclusive provider of the Dolgoff Plan, and is the leading expert in the United States on this powerful planning technique. John Canavan, Managing Member of DPC Advisors, LLC, holds the exclusive licensing rights for the Dolgoff Plan™ in New Jersey.

This will be a ‘don’t miss’ event. Please join us to learn how this powerful planning technique can be used in numerous ways to enhance your business – and benefit clients exponentially. You will now be able to show your business owner clients how you can provide perhaps the most powerful leverage of dollars and tremendous benefits for wealth accumulation, retirement, business succession, tax planning and more.

**Location: Bacari Grill**  
800 Ridgewood Road  
Washington Township, NJ  
<http://www.bacarigrill.com>

### **Schedule**

Check in: 11:30 a.m.  
Lunch begins: 11:45 a.m.  
Program Begins: 12:00 p.m.  
Program Concludes: 1:45 p.m.

**Time: 11:30a.m. to 1:45 p.m.**

**RSVP VIA EVENTBRITE.COM:** <https://greaternjepcjanuary2018.eventbrite.com>

Please process your complimentary member ticket via the above link by close of business Friday, January 12 to reserve your seat. Guests are always welcome and we encourage council members to invite estate planning colleagues to reserve their ticket which includes lunch. The cost for a guest ticket is \$75.

Applications are pending for continuing education credits for CFP, NJ CLE, NJ INS and NJ CPE (2.0). If you wish to receive CE credits you must provide the necessary information and you must sign in and you must sign out at the meeting and attend the full course!

