



FIRM TO HOLD ANNUAL SEMINAR FOR LOCAL BUSINESS LEADERS

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Whalen & Company CPAs will conduct a half-day, morning workshop on Wednesday, Nov. 2, on tax planning strategies, business succession and estate planning and employment law.

The seminar, the firm's fourth annual event, is open to area business owners and managers. It will be held at Worthington Hills Country Club, 920 Clubview Blvd. S., from 8 a.m. to 11:30 a.m.

To register for this free program, contact Tracy Ceritelli at (614)396-4200 by Friday, October 28. Registrants will be accepted on a first-in, first-served basis. Seating is limited to 75.

Highlights of the program include:

Patrick McClary, a director of the firm who oversees the tax department, will explore ways to minimize taxes and gain a better understanding of both new and old tax-saving strategies.

Lisa Shuneson, a partner of the firm, will discuss the importance of exit planning as an essential part of a business owner's financial and estate plans.

Julie Young of Willis & Willis Co., LPA, will discuss ways to proactively minimize the legal costs of being an employer by implementing effective employment policies, understanding employment law time bombs and knowing when to call your lawyer.

For additional information about the seminar, visit the firm's Web site at www.whalencpa.com.

About Whalen & Company

Whalen & Company, CPAs and Consultants is a full-service CPA firm in Columbus, Ohio (suburban Worthington), providing tax advice for individuals and tax planning, accounting, audit, valuation and business consulting services for middle-market business clients. The firm's staff members have both technical skills and industry-specific knowledge that enable us to focus on the success of our clients. Our expertise includes restaurants and other hospitality businesses, manufacturing, education and other nonprofit organizations, retail and distribution, real estate, and nursing homes and other health-related businesses.