

UAM CSULB NEWS

DO YOU COLLECT FINE ART OR MOTORCYCLES?
SPORTS MEMORABILIA? COINS? COMIC BOOKS? OR TEAPOTS?

UNIVERSITY ART MUSEUM

presents a special symposium sponsored by

Bonhams¹⁷⁹³
& BUTTERFIELDS

ALTERNATIVE ASSET PHILANTHROPY: TURNING PASSIONATE COLLECTIONS INTO A CHARITABLE LEGACY

A panel discussion on art succession and philanthropy issues relevant to collecting, disbursing and planning for major collections of art and antiques including lifetime and estate planning options

Thursday, February 28, 2008 7 - 9 PM

**Beach Auditorium, Student Union Building
California State University, Long Beach**

FORUM MODERATOR:

Peter J. May

Vice President and Relationship Manager, Wachovia Wealth Management, Bryn Mawr, PA

PANELISTS:

Abby Feinman

Estate and Trusts Attorney, Katten Muchin Rosenmann LLP, Los Angeles, CA

Robert W. Koo

Art Succession, and Philanthropy Consultant, Bonhams & Butterfields, New York, NY

Christopher Scoates

Director, University Art Museum, California State University, Long Beach, CA

Lawrence M. Shindell

Chairman and CEO, ARIS Corporation

R.S.V.P. – PARKING – DIRECTIONS

Please call the University Art Museum event line at 562-985-4384 to R.S.V.P.

Parking information and directions are available on the UAM website: www.csulb.edu/uam

Abby L.T. Feinman is a partner with Katten Muchin Rosenman LLP, Los Angeles, CA. She concentrates her practice on all areas of trusts and estates law, including estate and tax planning, the administration of estates and trusts and contested estate and trust proceedings. Ms. Feinman is admitted to the Bars of California, New York, Connecticut and Florida. She is a member of the California Bar Association and its Trusts and Estates Law Section, of the Los Angeles County Bar Association and its Trust and Estates Law Section, of the New York State Bar Association and its Trusts and Estates Law Section, of the American Bar Association and its Real Property, Probate and Trust Section, of the Connecticut Bar Association and its Estates and Probate Section and of the Florida Bar Association and its Real Property, Probate and Trust Law Section. Ms. Feinman chairs the Trusts and Estates Section of the Century City Bar Association and serves as a member of the Board of Governors for Cedars-Sinai Medical Center and the Penn Club of New York. She was recognized in 2006 as a Southern California Super Lawyer in Estate Planning and Trusts in *Los Angeles Magazine* and *Southern California Super Lawyers Magazine*. Feinman earned her undergraduate degree (B.S., 1991) from the Wharton School of the University of Pennsylvania, and her law degree (J.D., 1996) from Northwestern University School of Law.

Robert W. Koo is a collector, philanthropist, and well-respected art succession and philanthropy consultant with Bonhams New York, Philadelphia and Palm Beach. As practice leader in their Trusts and Estates group, Koo works with private clients, attorneys, CPAs, financial advisors, trust officers, planned giving officers, and corporate fiduciaries on planning for succession and disposition of art and tangible personal property. The team practice approach with clients and their professional advisors is to work in complete partnership to mitigate complex collection issues and simplify the generational disposition of art and tangible personal property from Picassos to Bentleys. For more than thirty-five years, as a team value-added art strategist, Koo continues to provide succession and disposition strategies to support clients to maximize the monetary value of art, increase cash flow, reduce capital gains and estate taxes, mitigate provenance risks, and create family and philanthropic capital. He is a well-recognized worldwide industry leader in inventory documentation and collection management issues for clients of art and tangible personal property. Koo created a web-based inventory and collection management application for clients to better manage their portfolio of art objects and share information with their professional advisors. The practice presently manages over \$2 billion of inventory and collection information for insurance, financial, tax, estate and charitable planning issues. In a recent article, Chubb Insurance interviewed him about "Best Practices for Maintaining Records of Your Collection." A frequent speaker, visiting lecturer and advocate for successful planned giving endeavors, Koo served as trustee at The Hudson River Museum, Hitchcock Presbyterian Church, and currently serves as an advisor on art planning for charitable giving to Florida Atlantic University Foundation, Norton Museum of Art, The Philadelphia Foundation, Delaware Valley Legacy Fund, WillPower Project, and other nonprofit organizations.

Peter J. May, JD, LL.M, CPA, CFP®, is Vice President and Relationship Manager with Wachovia Wealth Management in Bryn Mawr, PA. Mr. May joined Wachovia in 1998 as a key member of an advisory team responsible for providing business succession planning and personal financial advisory services to Merger and Acquisition clients, with particular emphasis on owners and key executives of privately-held and family owned corporations. With over twenty years experience in complex tax, legal, and financial advisory matters, his responsibilities include assisting clients in all aspects of personal financial planning and business planning for high net worth clients. He leads a team of experienced specialists that offer financial planning, trust and estate services, investment management, and insurance and customized credit solutions. Mr. May has participated on art panels at The Morris Museum, Birmingham Museum of Art, Lighthouse Center for the Arts, and The Fleischer Art Memorial. He has also been quoted in numerous publications including *The Wall Street Journal*.

Christopher Scoates is the Director of the University Art Museum, CSULB where he provides leadership and oversees the UAM's programs. His curatorial projects have addressed issues such as homelessness, neo-colonialism, gender, and identity politics. Scoates' writings have appeared in *New Art Examiner*, *Sculpture*, and *Art Papers* magazines. He has published numerous exhibition catalogues including: *Grand Gestures: The Gordon F. Hampton Collection*; *Nosegays and Knuckle Sandwiches: Work By Thomas Woodruff*; *Green Acres: Neo Colonialism in the US*; and *On Translation: The Games and Mining Culture in Technicolor*. Scoates holds an M.F.A. in Photography from Cranbrook Academy of Art (1986) and a B.F.A. from the University of Florida (1984). He has also studied at the prestigious Salisbury College of Art in the United Kingdom.

Lawrence M. Shindell, JD, is Chairman and Chief Executive Officer and co-founder of the ARIS family of companies, which created the first title insurance solution for fine art in the art and financial services industries. Formerly a practicing lawyer, Mr. Shindell represented or litigated against Fortune 500 companies in complex commercial and insurance trial and appellate litigation including litigation in international forums. Mr. Shindell remains actively licensed before several United States trial and appellate bars including the Bar of the United States Supreme Court. He later developed an art-consulting firm, which focused on art transactional risk management, working with the top echelons of the art museum, dealer, advisor and scholar communities in the United States and Western Europe. These activities led to founding the ARIS companies. Mr. Shindell has presented on the subject of the legal and financial complexities of title risks in the art world to the legal, financial services, art and wealth advisory communities widely in the United States. Mr. Shindell has been quoted on the subject in publications representing diverse audiences and industry sectors including *Forbes Magazine*, *Los Angeles Times*, *Risk & Insurance Magazine*, *A.M. Best BestWeek* and *BestWire* and national publications of the Appraisers Association of America, Inc.