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MAINE ESTATE PLANNING COUNCIL

Meeting Notice

Date: September 20, 2018

Location: Portland Country Club

Time: 4PM social; 4:30PM presentation

Topic: Risk Management and Best Practices

Presenter: John Raspante, CPA, MST, CDFA, Director of Risk Management, Whitman Business Advisors

With years of experience in the areas of risk management and professional liability insurance, John will share his clients' experiences, highlighting situations and behaviors to look out for, areas of concern and conflict, and ideas to avoid claims and litigation. John's presentation will include real life examples and case studies, as well as best practices. This promises to be a very interesting discussion for lawyers, CPAs and investment professionals.

Currently John is a member of NJSCPA where he serves on the accounting and auditing interest group and the editorial advisory board. He is also a member of the AICPA, Connecticut Society of CPAs and the NYSSCPAs where he serves on the Succession Planning Committee. John served as the President of the South Jersey Chapter of NCCPAP. In addition to Merger & Acquisition, Talent Acquisition and Training and Coaching, John will be expanding WBAs services by spearheading a Risk Management Consulting Resources offering. John, a Cyber-liability specialist will be providing intense education to Whitman Business Advisors clients and CPA firms Nationwide. John has both written and spoken extensively on CPA firm professional ethics education and will continue this at WBA.

Before joining Whitman Business Advisors John served as Director of Risk Management for CPA Protector Plan a division of Brown & Brown. Prior to that role John served in similar positions with North American Professional Liability Insurance Agency and Camico. John also served as Compliance and Education Director at Graf Repetti, a Top 200 CPA firm. Previously, John was a sole practitioner offering multiple services to a diverse clientele in the NY tri-state area.

PLEASE RSVP AT WWW.MEEPC.ORG
Free for Members; \$50 for non-members

