



Speaker Biography for Continuing Education Program

Program Sponsor: Society of Financial Service Professionals - Twin Cities

Program Date: Thursday, March 1, 2018

Program Topic: **What is Best: Traditional C Corporation, an S Election, or an LLC Taxed as a Partnership**

Speaker: James S. Aussem, JD AEP

Biography:



James S. Aussem, JD AEP
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James S. Aussem, is National president of the Society of Financial Service Professionals (FSP) and a shareholder in the Cleveland law firm of Cavitch Familo & Durkin, Co., LPA, as well as a member of its board of directors and Chair of the Business Practice Group. Mr. Aussem's practice is focused on succession planning, mergers and acquisitions as well as estates and trusts.

Mr. Aussem is a frequent speaker, facilitator, and instructor for many professional organizations on topics such as business succession, buying and selling businesses, estate planning, insurance, trusts and estates. He has spoken at the Society of FSP's Arizona Institute, Advanced Planning Clinic, the Cleveland Estate Planning Institute, the AICPA Advanced Planning Institute, the Cleveland Tax Institute, the Ohio Accounting Show, the Ohio Society of CPA's Annual Tax Seminar, the Ohio State Bar Association, the Federal Bar Association, Cleveland Marshall College of Law, the Northern Ohio Planned Giving Day, MetLife Advanced Planning Symposiums, Ameritas Forum among other organizations.

Mr. Aussem was elected to the Executive Committee of FSP effective September 1, 2015 after serving as a national director since 2012. He became the 90th president of FSP effective September 1, 2017. He has been active in the Cleveland Chapter, serving as President 2010-2011. He serves on the Planned Giving Committees of the Cleveland Museum of Art, University Hospitals and Baldwin-Wallace University. He is a member of the Cleveland-Marshall College of Law, Dean's National Advisory Council and also a member of the American, Ohio, and Cleveland Metropolitan bar associations as well as the Estate Planning Council of Cleveland. He has been chosen as one of America's Best Lawyers every year since 2009 and for the past

7 years he has been chosen in two categories, Corporate Law and Trusts and Estates.

Mr. Aussem has been designated an Accredited Estate Planner (AEP®) by the National Association of Estate Planners & Councils. Baldwin Wallace University in 2004 presented him with its Distinguished Alumni Award and The Cleveland Chapter of the Society of Financial Service Professionals named him its Financial Service Professional of the Year in 2013.

He earned his Juris Doctor degree from Cleveland-Marshall College of Law. Mr. Aussem began his legal career as a tax attorney with Ernst & Ernst (now Ernst & Young). He worked his way through undergraduate school employed in the securities industry, as well as in the trust department of the former National City Bank. He graduated from Baldwin-Wallace University with a Bachelor of Arts degree.

Mr. Aussem is AV® Preeminent Rated - Martindale-Hubbell