



Three-Part Telephone & E-mail Seminar:

Investors Options For Beginners

Speakers: Edward Carroll, Henry Chang, Robert Gaffney, Barry Gleen, Carolyn Lee, Susan Pilcher and Richard Sindelar

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Seminar Outline

FIRST Phone Session on February 26: Options for Entrepreneurs

- H-1B – Beneficiary Ownership
- L-1 & E-2 – A Comparison
- LPR – Extraordinary Ability
- LPR – Multi-National Executives and Managers
- LPR - National Interest Waivers

SECOND Phone Session on March 26: Comparing E-2 and EB-5 Investments

- Amount of Investment
- Type of Investment
- Employment Creation
- Source of Funds
- Risk
- Involvement of the Investor
- Timing

THIRD Phone Session on April 30: EB-5: Individual v. Regional Center Cases

- Commercial Enterprise
- Employment Creation
- Management / Role of Investor
- Amount of Investment
- Source of Funds
- Removal of Conditions

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[] CD Feb 26 [] CD Mar 26 [] CD Apr 30 2.00pm to 3.30pm ET (11.00am to 12.30pm PT)

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(→ see next page for speaker bios)



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About the Speakers

Edward Carroll (Discussion Leader) is a graduate of S.U.N.Y.-Binghamton (B.A. 1966) and Brooklyn Law School (J.D. 1969) and was admitted to the Bar in N.Y.S. in 1969 and in Vermont in 1974. Articles authored by Mr. Carroll have appeared in publications of the American Immigration Lawyers Association, the American Bar Association, the Vermont Bar Association and in Canadian publications. Mr. Carroll has served the American Immigration Lawyers Association as a member of the Permanent Immigration Policy Committee, the Investor (EB-5) Committee and the Border Security Issues Committee, the Admissions & Interior Enforcement Committee and as Co-Chair of the Liaison Committee to the Vermont Service Center. He has also been liaison to CIS, CBP and DOL offices in Vermont for AILA's New England Chapter. He was Vice-Chair, of the ABA Immigration Law Committee, General Practice Section, 1994 - 2001. Mr. Carroll is a frequent presenter on U.S. immigration law to legal and business groups in the U.S. and Canada and at AILA conferences. He has taught immigration law to INS employees at the Vermont Service Center. He has been a commentator for radio and television on immigration issues. Mr. Carroll is listed in Best Lawyers in America.

Henry Chang is an attorney at the Law Firm of Chang & Boos. Mr. Chang obtained his law degree from Osgoode Hall Law School in 1990. He is a member of both The State Bar of California and The Law Society of Upper Canada ("LSUC"). Mr. Chang is also licensed as a Foreign Legal Consultant by the Law Society of Upper Canada, which is a requirement for all Ontario lawyers who provide advice on the law of a foreign jurisdiction. A recognized authority in the field of United States and Canadian immigration law, Mr. Chang lectures extensively on the subject of cross-border mobility law in both the United States and Canada. His articles have appeared in numerous nationally- and internationally-recognized publications. A partial list of recent publications and speaking engagements appears below. Mr. Chang also mentors other lawyers in the practice of immigration law in the United States and Canada.

Robert P. Gaffney received his Juris Doctor Degree from University of California, Hastings College of the Law and was admitted to the bar in 1980. Mr. Gaffney is a Specialist in Immigration and Nationality Law. He is a long-standing member of the Immigration and Nationality Law panel of the Lawyer Referral Service of the San Francisco Bar Association. Through his private law practice in San Francisco, Mr. Gaffney has over 25 years of experience counseling a wide range of corporate and individual clients in areas of employment-related, investment, and family based visa and immigration matters. Mr. Gaffney has developed significant expertise representing professional employees, as well as managers and executives of multinational firms, alien entrepreneurs and skilled workers in obtaining U.S. temporary employment visas and permanent residence under the provisions of the Immigration and Nationality Act. Another area of emphasis of the firm's practice is the processing of "national interest" waivers on behalf of exceptional artists and persons with advanced degrees.

Barry Gleen is of counsel at Akerman Senterfitt, Attorneys at Law. Mr. Gleen has more than twenty years' experience practicing immigration law. He specializes in obtaining both temporary (E, H, L, and O) and permanent visas (green cards), for both individuals and employees of the firm's clients. He represents entertainment conglomerates, drug and pharmaceutical companies, perfume manufacturers, investment banks, and engineering companies, to name a few. He is a member of the American Immigration Lawyers Association, serving as Chair of its Corporate Practice Committee from 2002-2003 and during its present (2008-2009) session. He has lectured widely abroad on US immigration matters and is a frequent participant in the "Ask the Experts" programs sponsored by AILA. He is fluent in French and Spanish, having received a diploma from the French Study Institute of the University of Grenoble.

Carolyn S. Lee is a Partner at Miller Mayer LLP. She graduated cum laude from Williams College in 1993 and received her J.D. from Cornell Law School in 1999 where she graduated with a specialization in International Legal Affairs. Carolyn's practice focuses on EB-5 investors, academics, foreign medical graduates, and increasingly, artists. She was the moderator at a recent AILA EB-5 Teleconference entitled "New Developments in EB-5s" (October 25, 2007) and also was a presenter on EB-5 issues at an ILW.com workshop entitled "Solving Complex Immigration Challenges While Super-Charging Your Career and Your Law Firm" (March 30, 2007). Carolyn is also co-author with Stephen Yale-Loehr on the comprehensive EB-5 article entitled "[EB-5 Immigrant Investors](#)" published annually in the AILA Handbook and is also the author of "[Ethical and Practical Considerations in EB-5 Representation](#)" first appearing on ILW.com.

Susan Pilcher joined Carroll & Scribner as Of Counsel in January 2007 after six years with a prominent Burlington, Vermont commercial law firm, where Ms. Pilcher's business practice focused on immigration, intellectual property, health care and commercial litigation. Having provided leadership and management of her former firm's immigration practice since 2003, she honed her expertise with successful adjudication in broad range of immigration matters, including H-1B, L, TN, H-2B, E, O, J-1 waivers (physician and no objection), B-1/B-2 (including in lieu of H-1B), F-1, PERM, EB-1, EB-2, EB-3, EB-5, VAWA, K-1, K-3, and family-based matters of all kinds. She has represented businesses before ICE in worksite enforcement matters, conducted I-9 audits, and provided in-house training on employment authorization and related matters. She has extensive experience with consular processing, border practice, and local adjudications. Ms. Pilcher has published and lectured extensively on a variety of topics, including immigration law, environmental and agricultural law, criminal law, and legal practice techniques.

Richard Sindelar is of Counsel at the Houston location of Tindall & Foster, P.C. Mr. Sindelar received his J.D. from Georgetown University. He is part of the AILA National Business Advocacy Committee and involved in many community and legal organizations such as the Middle East Institute, Houston World Affairs Council, Houston Council on Foreign Relations, Texas Bar, District of Columbia Bar, Adjunct Professor, University of St. Thomas (2003 to present), U.S. State Department Foreign Service Officer (1973-1995), Deputy Consul General, Monterrey, Mexico (1994-1995), Deputy Director, Bureau of Intelligence and Research, Middle East (1991-1994), Montreal (1988-1991), Division Chief, Coordination Division, Office for Legislation, Regulations and Advisory Assistance (1986-1988) and Various Middle East and Advisory Opinion Posts (1973-1986). He is the author of "Right to Counsel," Georgetown Law Journal's 1983 Criminal Procedure Project and co-Editor of Crosscurrents in the Gulf (Sindelar & Peterson, eds., London: Crooms-Helm, 1988).