



TRI-VALLEY ESTATE PLANNING COUNCIL

Oct 2011

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President's Message

The October meeting is now just days away and we have another power packed speaker. This month is a good time to approach your clients about their Estate Plans. As many families gather in the months ahead to celebrate holidays, I have found it is a great time to bring up their future desires. One concept that I have used in the past is referred to as "Family Love Letters."

Family love letters is a very basic concept. Simple ask your clients to consider writing a letter to each of their family members telling them how much they love them, what they are proud of, and express the words that you want to make sure they hear, even if you do not actually give them the letter this year. If you write a letter and feel it is a good time to give it, please do. If not, then at least write it and keep it in a box for future years. One of the best gifts you can leave to them in the future will be handwritten letters expressing your true feelings, even you could not tell them personally.

I tell them, "When writing these letters, I would like for you to also consider what you desire to leave them as part of your legacy. Things like words of wisdom, family history, and even personal belongings. Let's examine everything you have and make sure your wishers are the same as when you set things up. Do we need to make any changes to beneficiary documents? Are there any additional or new charities or organizations you want to leave something too? Are their new family members, grandchildren you want to leave anything too? Are there any additional needs you have that we have not discussed prior?" You get the point. It is a great way and a great time of year to discuss the legacy they want to leave.

Everyone leaves a legacy, either by default or by design. We are here to help them leave a legacy by design. Take time to call your clients. Talk to them about their desires. Help them become organized with their financial and estate planning affairs. See you on the 6th!

-Shane
Westhoelter

Estate Planning Strategies for Same Sex Married and Registered Domestic Partners and Unmarried Partners

The landscape has dramatically changed over the last 3 years, and now Don't Ask Don't Tell has been repealed. How do you advise clients who themselves are Registered Domestic Partners or Same Sex Married Couples, or who have children who are? How do you handle community property when the federal government still has the Defense of Marriage Act and the IRS wants tax returns done strangely? How do you handle separate property and separate liabilities? What are your ethical obligations for disclosure to this clientele? Whether you need basic understanding to serve this clientele properly, or whether you are comfortable but need the latest update, come hear our engaging and informative speaker for October's meeting, **Deb Kinney, Esq. DLK Law Group, PC.**

Deb is a known resource for emerging issues for Registered Domestic Partners, same sex married couples and others who have relationship recognition from outside of California. She practices in offices in San Francisco and Santa Rosa.

Thursday, October 6, 2011

Marriott Hotel Pleasanton

6:00 PM Wine and Registration

6:30 PM Dinner and Speaker

\$40 Preregistration

\$45 Call in after 1:30 PM on Oct 4

Send a check to the TVEPC office today or by credit card

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