TRI-VALLEY ESTATE PLANNING COUNCIL

Sept 2011

TVEPC Office
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Concord, CA 94518-2835
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President's Message

In just a few weeks we begin our 2011-2012 program year. I am looking forward to serving this great organization and working with the talented board you have elected. Together we will strive to bring you exciting programs and informational speakers. The year ahead appears to potentially be one of interesting change. Recent market swings, credit rating down grade, and continued budget, tax and health care debates will keep all of us challenged on the learning curve. The ability for each of us to gather together, network as professionals and discuss these items is what Tri-Valley Estate Planning Council is all about.

Recently while working with a couple on their estate planning, I experienced a unique conversation. I presented the question to the couple, "If your husband were to pass away would you desire to continue to live in the current home?" She quickly replied, "Yes, I love this home and see no reason to leave." I then asked, "If he passed away unexpectedly in the near future, would you intend to remarry at some point?" She thought for a brief moment and replied, "Yes, I would remarry." The husband, a bit taken aback at her reply, joined in the conversation and asked, "If I passed away and you remarried, would you keep my bright red corvette in the garage and would you allow this 'new husband' to drive it?" She thought for a moment and then replied, "Of course I would keep it, and if he wanted to drive it I guess I would allow him to drive it." With a bit of a puzzled look on his face, the husband asked, "Well I must ask a personal question, would you keep my prized golf clubs and if yes would this new husband, be using my golf clubs too?" She looked over at him and said, "No, of course not, he is left handed."

See you at the September kick off meeting.

-Shane Westhoelter

Meeting Sponsored By:
Celia Mason
Bank of Commerce
cmason@celiamason.com
925.998.4678

"Important Year End Tax Planning"

What a year for dramatic change in estate tax law, which resulted in tremendous planning opportunities and practitioner anxiety about what to do and how to do it! Please join us for a presentation by tax and estate planning specialist **Michael Gerson, Esq**. on how he is approaching the year-end with his clients. Learn what tax and estate planning opportunities not to miss before their anticipated expiration this year or next, what strategies need to be completed before greater IRS scrutiny is implemented, and how to approach this two-year temporary set of tax and estate planning laws. His background makes him ideally suited for these topics.

Michael has an LL.M. in Estate Planning from the University of Miami, Florida, and has spent the past 12 years practicing tax and estate planning law. Michael is certified by the State Bar of California Board of Legal Specialization as a specialist in Taxation Law and Estate Planning, Probate and Trust Law. He is nationally-known attorney who is a frequent speaker on diverse topics relating to estate planning and tax issues, and he has presented throughout California.

Michael serves on the Executive Committee of the Trusts and Estates Section of the State Bar of California and is an editor of the California Trusts and Estates Quarterly.

Michael practices with the offices of Hartog & Associates, Inc., in Orinda, California.

Thursday, September 1, 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 Aug 30

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

https://123signup.com/calendar?org=tvepc