



East Bay Council News

February 2010

President's Message

We've turned the corner on a new year, and I trust this signals a brighter 2010. As long as we and our clients maintain a clear perspective on the things that truly matter – if you and those around you enjoy good health, and if you can find contentment in providing meaningful service to your clients – how can you have a better foundation from which to launch a great year!

As an organization, we've tried to do our part in setting the right tone for the year. Responding to a groundswell of desire that we do more to promote collaboration among the members, our first ever event dedicated solely to socializing took place on January 21st at Mua Lounge here in Oakland. The crowd was large and I have received only positive feedback on its concept as well as its execution. Kudos to board members Kelly Johnston, Kathleen Courts and Meg Connell for pulling off a real success, surely to set a precedent for this kind of activity going forward.

While appreciation is being handed out, let's not forget the stellar programming Margaret Zywicz has provided this year. I anticipate our February presentation to continue the high quality we have come to expect.
– David Levin

“The Ethical Trustee: Ethics Issues in Trust Administration”

Lisa M. Carvalho and Stacie Polashuk Nelson will discuss the ethics landscape applicable to fiduciaries performing trust administration, illustrated by specific examples and questions from the audience.

Lisa M. Carvalho is a partner in the Oakland office of the law firm Reed Smith. Lisa's practice includes a variety of fiduciary and commercial litigation. In the trusts and estates area, Lisa represents individuals, corporate fiduciaries and third-party claimants. Lisa is a frequent speaker on a variety of topics ranging from trust litigation to general litigation.

Stacie Polashuk Nelson is of counsel in the Oakland office of Reed Smith. Stacie's practice focuses on trusts and estates administration and litigation. Stacie is the former co-chair of the Alameda County Bar Association's Trusts & Estates Litigation Section. Stacie is also a frequent speaker on trust and estate litigation.

Monday, February 8, 2010

Scott's Seafood Restaurant

Jack London Square
Oakland

6:00 PM Wine Reception

6:30 PM Dinner Meeting

\$35.00 paid in advance

\$40.00 at the door

Please make your **check** payable to “EBEPC” and mail to:
781 McKean Place,
Concord 94518

Or for **credit cards**:

<https://www.123signup.com/calendar?Org=ebepec>

Or call 925.686.4819

before 1 PM on

Thursday, February 4th

Meeting Sponsored By:

Greg Finn

Fremont Bank Trust Dept

39170 Fremont Blvd.

Fremont, CA 94538

510.505.5393

February Menu:

Wild Mushroom

Chicken Piccata

Next Meeting

March 8, 2010

Mary Kay Foss, CPA
“Roth IRA Conversions”

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