



East Bay Council News

March 2011

President's Message

It was great to see everyone at the February meeting. I hope that you enjoyed Professor Schwartz and his discussion of the 2010 Tax Act. I have attended a few talks on the new Tax Act, and each time I have picked up a few new details. This month we will turn away from estate and gift taxes and take a practical look at trust administration following the death of a settlor.

Trust administration is a topic that most of us have dealt with and will continue to deal with in our practices. Although trust administration as a topic may sound mundane, I know from my experience that each matter can bring a new wrinkle. This month's presentation is suitable for the seasoned practitioner and newcomer alike. Please join us as we welcome a local team of experts from the Roisman Henel firm in Oakland.

Also, remember that we do not meet in April. However, we are invited to join the Diablo Valley Council on April 20th where the topic will be *Litigation over Estate Plans and Intra-family Challenges* by Barbara Jagiello, Esq.

I hope to see all of you on March 14th.

Regards,
Margaret Zywicz

Trust Administration 101: What the Trustee Needs to Know

I actually like Trust Administration 101: *The Final Exam*.

We're very fortunate this month to have some of our own expert members to present the ins and outs of trust administration following the death of the settlor. Our presentation covers topics such as the ongoing duties and liabilities of the trustee, accounting requirements, reviewing and inventorying assets and liabilities, addressing special assets (including business and real property interests and retirement benefits), estate and income tax reporting, and distribution of assets.

Roisman Henel LLP, located in Oakland, is a boutique law firm specializing in estate planning, probate and trust administration.

Carolyn E. Henel is a partner at Roisman Henel LLP. She is recognized as a "Super Lawyer," selected by her peers and the publishers of *Law & Politics* and *San Francisco Magazine*. She

graduated from University of Virginia School of Law with a J.D. in 1996.

Anne Bruner Nash is of Counsel to the firm. Anne is a fifth-generation native of the Bay Area and fourth-generation lawyer and also voted a "Super Lawyer." She graduated from University of California at Berkeley, Boalt Hall School of Law with a J.D. in 1987.

Jeffery B. Levi is an associate at the firm and was selected by his peers and the publishers of *Law & Politics* and *San Francisco Magazine* as one of Northern California's "Rising Stars" in 2009 and 2010. His educational background includes University of San Francisco, J.D., *cum laude*, 2000.

April 20, 2011

*Join us next month at
Estate Planning Council
Diablo Valley
Lafayette Park Hotel*

Monday, March 14, 2011

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=ebepc>

Or call 925.686.4819
before 1 PM on
Thursday, March 10th

Meeting Sponsored By:

Allison Bradley
Michaan's Auctions
2751 Todd Street, POB 489
Alameda, CA 94501
510.740.0220 x 105