



East Bay Council News

November 2011

President's Message

It is always wonderful to hear Virginia Palmer speak, as she did last month, on same sex couples and the law. I usually seem to think about a client I need to direct to her. This month our VP, **David Little**, has arranged for John Hartog to speak on Reviving Stale Trusts.

The Board is working on several activities. Our membership chair **Liz Grager** and Board are finished getting the last of the current members' dues in and we expect a hard copy of the directory at this meeting. In addition at this month's Board meeting we expect to complete the D&O Insurance placement per Section X of the by-laws.

At the last Board meeting it was decided to adopt a new policy for meeting sponsorship. It will involve an expression of interest, a random drawing, and first priority to people who have not sponsored a meeting the previous year.

Please remember to RSVP at your earliest opportunity before the meeting to Bonni if you plan to attend. It is important for us to know beforehand how many people plan to attend so Scott's can be prepared.

-Jesse Walden

Breathing Life Into Stale Trusts

Challenges for Fiduciaries, Attorneys, and Accountants

It happens more often than it should. A trust gets stale when subtrusts do not get funded, or when the subtrusts are not properly administered by the trustee. Whatever the cause, the stale trust is usually not discovered until it has been stale for several years. Reviving a stale trust will often require tracing years of transactions to determine which subtrusts to allocate assets, income, and tax liabilities.

Monday, November 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=ebepec>

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

Meeting Sponsored By:

David Little
Law Offices of Margaret Hand
1939 Harrison Street, Ste. 200
Oakland, CA 94612
510.444.6044

John A. Hartog, is the principal of Hartog & Associates, Inc. and one of the preeminent trust and estate attorneys in California. He will discuss how trusts become stale and what attorneys, fiduciaries, accountants, and others can do to freshen them back up.

Mark Your Calendars!

Thursday
January 26, 2012

Annual
Networking
Extravaganza

Watch your mailbox
for more information
