



# East Bay Council News

October 2009

## President's Message

Greetings fellow members! Let me just say (if I can be so bold) that we are off to an excellent start this term. Our September dinner meeting presenters were well received by the membership. I have no doubt that our future presenters will keep pace.

Speaking of presenters...our next speaker, Mr. Greenberg, will present on GRAT's, IDGT's and QPRT's. Apropos of the alphabet soup theme are the current undertakings of your board: We have been busy trying to adjust and revamp our MNO's (our *membership networking opportunities*), and our MSFM (*membership survey feedback mechanism*). But, of course, you already knew that (that is, if you have a teenager that is never without his or her texting device (LOL - "laugh out loud" for the uninitiated).

Thanks for helping to usher in an exciting new year. I'll look forward to seeing you on October 12<sup>th</sup>, but in the meantime, if you have any questions or comments for me, please email me your inquiry, to [dal@jmbllaw.com](mailto:dal@jmbllaw.com)  
- David Levin

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## "Alphabet Soup: How to fit GRATs, IDGTs and QPRTs into your Estate Planning Practice?"

We estate planners love our acronyms. Our estate planning jargon is full of them...the above being only a few. This month's program will examine the features and benefits of GRATs, IDGTs and QPRTs. Our speaker will present the genesis of these sophisticated estate planning tools, the income and estate tax rules governing them, and how and when these tools may fit into an estate plan.

Our speaker this month is **Myron Greenberg**, an attorney in Marin County with more than 35 years of legal experience and

who is also a CPA. Mr. Greenberg opened his own practice in Larkspur in 1982, and before that he was a partner in several prominent San Francisco law firms. He is a Certified Specialist in Taxation Law. He is a frequent speaker on estate planning topics and taxation. From 1989 to 2003 he served as an instructor at the University of California Berkeley Extension, teaching a class on estate planning; and he has also been an instructor at Golden Gate University, School of Taxation. He is the Past President of the Marin County Bar Association and also Past President of the Marin County Estate Planning Council.

**Monday, October 12, 2009**

### 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**:

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Or call 925.686.4819  
before 1 PM on  
Thursday, October 8<sup>th</sup>

### Meeting Sponsored By:

**Roger Cormier**  
**Cohen Cormier Elder Care**  
**2100 Embarcadero, Ste. 101**  
**Oakland, CA 94606**  
**510.652.3377**

All directory ads need to  
be received by October 15.



WEALTH MANAGEMENT

