



East Bay Council News

October 2011

President's Message

Last month we were brought up to speed on Special Needs Trusts by Kevin Urbatsch and we thank him for this. This month our Vice President, **David Little**, has gotten Virginia Palmer to speak to us on the legal progress of Same Sex Couples.

The Board is involved with several issues currently. Our membership chair **Liz Grager** and the rest of the Board are trying to get the remaining members to **GET THOSE DUES IN**. We will have the directory out as a hard copy by the November meeting. Don't delay.

Liz Grager, Carla Bryant and Kelly Johnston met as a sub-committee to discuss a variety of member and potential member issues. As the year progresses I'll highlight these and the actions we are taking. Board Members **Becky Cachia-Riedl and David Chick** have been working on the liability insurance requirements in our newly revised section X of the by-laws. The Board is also revising the methods used to allot meeting sponsorship opportunities to make them more inclusive.

Please feel free to reach out to the members of the Board with thoughts and suggestions to make the EBEPC a better organization. See you on the 10th.
- Jesse Walden

"Recent Developments in Same Sex Marriage"

Proposition 8 litigation. Same sex marriage in New York. Repeal of "Don't Ask, Don't Tell" and challenges to the Defense of Marriage Act. IRS Private Letter Ruling 149-319-09 requiring domestic partners to report community income on their income tax returns. A lot has been happening lately in the world of same sex marriage. These changes nationally are important for estate planners here in California. **Virginia Palmer**, a partner in the Oakland law firm of Fitzgerald Abbott & Beardsley, will help us sort through it all. Ms. Palmer is a partner in FAB's Estates and Trusts Practice group. She speaks throughout California on the topic of estate planning for same sex couples. Ms. Palmer is a member of the Trust and Estate section of the State Bar of California, and the American College of Trust and Estate Counsel. Advising same sex couples presents unique challenges for estate planning and trust administration, and the rapid changes in this area make Ms. Palmer's talk a must-see event.

Monday, October 10, 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, October 6th

Meeting Sponsored By:

Jesse Walden
Merrill Lynch
1111 Broadway, 22nd Fl
Oakland, CA 94607
510.208.3859

Mark Your Calendars!

November 14, 2011
"Reviving Stale Trusts"
John Hartog

Dues Are Due!
Click [HERE](#) to pay