



# East Bay Council News

September 2009

## President's Message

It is hard to let go of these waning summer days, but the new term for your East Bay Estate Planning Council promises to herald some exciting changes which will make this transition easier. Not passing these lazy summer days idly, this year's Program Chair, Margaret Zywicz, has been busily working to line up a great roster of presenters for this year. She has been focused on delivering technical content to our members, while ensuring that the topics remain interesting and relevant. Toward that end, our September meeting will present the team at Thompson Jones LLP to discuss recent developments and changes in estate tax. Invite your colleagues!

Apart from our programming, we are working hard this year to focus on responding to our members' needs. For instance, we have expanded the opportunities for our members to market their services to the broader membership through links in this and future newsletters. Stay tuned for more changes to your membership experience.

In the meantime, please join us on September 14<sup>th</sup> for our first program. I'll look forward to seeing you there. – David Levin

**If we haven't received your dues, an invoice is enclosed**

## "Surely You Jest: 2010 Without Estate Tax?"

2009 is not over, but so far it has included new legislation, court cases and final and newly proposed IRS regulations, as well as significant IRS guidance in key areas. In addition, 2010 is around the corner, and estate tax just may disappear. What better way to kick-off the 2009-2010 EBEPC Season than with an estate tax update. If you have been taking it easy on technical journals, reports and emails over the summer, we have a great program on recent developments and changes in estate tax.

Our speakers are principals in the accounting firm of **Thompson Jones LLP**, Monterey, California, and both focus their practices on estate planning. **DeeAnn L. Thompson** has more than twenty-nine years of experience as a CPA and has developed her skills to tackle

**Monday, September 14, 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**:

<http://www.123signup.com/calendar?Org=ebepc>

Or call 925.686.4819  
before 1 PM on  
Thursday, September 10<sup>th</sup>

### **Meeting Sponsored By:**

**Barbara Beery**

**Children's Hospital and  
Research Foundation**

**2201 Broadway Ste. 600  
Oakland, CA 94612  
510.428.3885 x5233**

complex problems in detail and produce user-friendly analysis. DeeAnn is a board member for HOPE Services in Santa Clara, California, a non-profit corporation serving individuals with developmental disabilities, and chair of its Monterey County Development Committee. **Michael J. Jones** is widely respected among his peers in the area of estate planning for IRAs and retirement plans. Mike is the author of *The Pension Answer Book: Special Supplement on the Final Regulations Governing Minimum Required Distributions* (Panel Publishers, June 2002). He serves on the Editorial Advisory Board of *Trusts and Estates* as Chair, Retirement Benefits Committee. Michael is a frequent speaker both locally and across the country.

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