



East Bay Council News

September 2011

President's Message

Welcome back!

This summer your officers and Board of Directors have been hard at work. We have a number of initiatives working to make the organization better for us all. **David Little**, our Vice President and Program Chair has almost all the speakers lined up for the year. Quite an impressive feat. Not to steal his thunder, but we'll hear from experts in the field of taxes, various specialized trust issues, the capital markets, and family/estate planning. It promises to be very educational.

Liz Grager, our Membership Chair, is heading up several activities for use to make greater penetration into our local estate planning community. The mix masters of the Board are well advanced on our January networking event. In addition, we are looking at sponsorship opportunities within our community to increase our visibility.

A major accomplishment for us this summer was completion of a full revision of the Bylaws. **Margaret Zywicz, Gloria Park, Rebecca Cachia-Riedl**, and **David Chick** worked very hard we thank them. We will vote on it at our September membership meeting. See you on the 12th.

- Jesse Walden

Pooled Special Needs Trusts: What Are They, When to Use Them, and When Not to Use Them

Attorneys and others unfamiliar with the Pooled Special Needs Trust (or "Pooled SNT") often ask: "when should I use a Pooled Special Needs Trust?" "If I use one, what should I look for in a Pooled Special Needs Trust?" There are many factors in deciding whether to recommend a Pooled Special Needs Trust to your client. In our first meeting of the 2011-2012 season, special needs planning attorney Kevin Urbatsch will provide information and insight on utilizing one of California's Pooled Special Needs Trusts.

Monday, September 12, 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, September 8th

Meeting Sponsored By:

Steve Turner
Bonhams & Butterfields
220 San Bruno Avenue
San Francisco, CA 94103
415.503.3222

Kevin Urbatsch is one of the foremost authorities in California on special needs trusts. He is a principal with the firm Myers Urbatsch PC in San Francisco. Kevin was the attorney-editor of the Continuing Education of the Bar publication *Special Needs Trusts – Planning, Drafting and Administration*, and is the author of the chapter on Pooled Special Needs trusts. He was co-author of Nolo's book *Special Needs Trusts* and author of the upcoming book *Administering the California Special Needs Trust*. He is currently the attorney for the California Charities Pooled Special Needs Trust. Kevin writes and speaks often on the subject of Pooled SNTs.

You will not want to miss this presentation!