



# East Bay Council News

September 2008

## President's Message

They say all good things must come to an end, so we bid farewell to summer and gear up for a very exciting fall! I am not just referring to the presidential election, but also to the excellent selection of programs slated for the 2008-2009 season of the East Bay Estate Planning Council. As our new Program Chair, David Levin is busy booking top notch speakers on a variety of topics that are sure please, no matter what your involvement in estate planning. In our first meeting Ron Linder will bring us current on Uniform Principal and Income Act changes in California. Colleagues are welcome! Make an advance reservation for a first time guest at half price!

Remember, we're doing our part to go a little greener, so this is your last engraved invitation. All future invitations and correspondence will arrive via email. If you use your letter as an invoice and require a paper copy to pay, you can always print a copy from the link within the email notice. If you just *cannot* live without a snailmailed paper copy, we will make exceptions this year only.

We hope you will join us on the 8<sup>th</sup> and all season long as we strive to provide programs that educate, and stimulate. -Kelly Johnston

## "Lest We Forget: The Ongoing Impact of Income Tax Issues"

As summer draws toward an end and we confront the tyranny of shorter days and maybe even shorter lists of our summer books that got read, we can now turn attention once again to all things practice related and confront those often thorny income tax issues considered an indispensable facet of estate practice. Our kickoff program is going to review what is happening with the Uniform Principal and Income Act in California and how it effects our planning and administration of estates and trusts.

**RON J. LINDER, Esq.** received his B.S. in Economics from the University of Pennsylvania and his L.L.B. from the University of Michigan Law School in 1959. He received his L.L.M. (Taxation) from the New York University School of Law in 1960. Mr. Linder is a California

**Monday, September 8, 2008**

### 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 Bonni in the enclosed return envelope before Thursday, September 4th or call 925.686.4819

### Meeting Sponsored By:

**Mark Petersen**

**Clar's Estate Auction Gallery**

**5644 Telegraph Avenue**

**Oakland, CA 94609**

**510.428.0100 ext.111**

### Mark Your Calendars!

**October 13, 2008**

**November 10, 2008**

**January 22, 2009 w/SFEPC**

**February 9, 2009**

**March 9, 2009**

**April 22, 2009 w/EPCDV**

**May 11, 2009**

Certified Public Accountant and a Member of the Bar in California and Ohio. He is a member of the Estate Planning Council of San Francisco and was President in 1986-1987. He has authored courses on estate planning for the California CPA Foundation and is a frequent lecturer on tax, trust law and related matters for various organizations. Formerly, he was a Partner at Arthur Young & Company (now Ernst & Young). Mr. Linder joined the firm in 1985.

Ron's presentation will review and highlight the basics of UPI, focusing on new UPI developments in California, as well as its interrelationship with recent tax law developments, as well as the all important tension between income and estate planning.

### Dues Are Due!

**If you've already paid your membership dues, then Thank you! If we haven't yet received your dues, an invoice is enclosed.**