

President's Message

We had a pretty small group for what turned out to be a very informative talk about alternative investments. Unfortunately most of my clients don't have the financial clout to use these investments except in some sort of pooled arrangement.

This month's talk is something I have tried to put on for a couple of years. The March 13th meeting will be a "Trustee Panel" featuring a bank/corporate fiduciary, an attorney speaking on behalf of individual/family trustees and a private professional fiduciary. Deanna Lyon will act as the moderator. Sharon Toth with IMT Associates will represent the private fiduciaries; Kirsten Weisser will represent the bank/corporate fiduciaries and Tim Smallsreed will represent the private/family fiduciaries.

This will be a good opportunity to ask questions of a practical nature of these professionals. If there are any questions you might want to pose to the panel, please get them to me?

Finally, if any one has any comments regarding how strict or liberal we should be with our professional categorizations, please email me your comments.

- JD Kessler

"Fiduciary Issues and Trends: A Panel Discussion"

Join us for a Fiduciary Panel Discussion on Current Issues Affecting Decisions as to Who, When, How and Why to Select a Trustee for your own or your client's needs. Trustees need to be knowledgeable about investments, experienced in managing trusts, familiar with taxes and accounting, and have demonstrated business acumen. The East Bay Estate Planning Council is honored to be able to gather together in one evening three very competent and well known individuals who

Monday, March 13, 2006

Scott's Seafood Restaurant

Jack London Square
Oakland

6:00 PM Wine Reception

6:30 PM Dinner Meeting

\$30.00 paid in advance

\$35.00 at the door

Please make your check payable to "EBEPC" and mail to Bonni in the enclosed return envelope before Thursday, March 9th or call 925.686.4819

Meeting Sponsored By:

Ralph Sklar

The Silver Group

1000 Marina Village Parkway,

Suite 120

Alameda, CA 94501

510.748.5333

Ms. Kirsten Weisser has extensive experience with trust and investment management having served in the role of senior fiduciary officer with large corporate financial institutions. Don't miss this very exciting and informative event. Many of the questions you have always wondered about may indeed be addressed at this event.

will discuss and field questions as they relate to the above and other questions provided from the perspective of a family fiduciary, a private fiduciary and corporate fiduciary. **Tim Smallsreed, Esq.**, a partner from the law firm of Fitzgerald Abbott and Beardsley, LLP will represent the role of a family trustee, **Sharon Toth, LCSW, MFT** of IMT Associates will represent the role of a private fiduciary, and **Kirsten Weisser**, Executive Vice President of Mechanics Bank will represent the role of a corporate trustee. **Deanna Lyon, Esq.**, a partner from the law firm of Wendel Rosen Black & Dean who has extensive experience in planning with estates and trusts, will ask the questions and act as moderator for the Panel. Tim Smallsreed focuses his practice on business transactions, estate planning and trust administration and has many years of experience issues affecting family fiduciaries. Ms. Sharon Toth has extensive experience as a private fiduciary and is the Past President of the California Association of Private Professional Conservators and Fiduciaries.

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