



East Bay Council News

September 2007

President's Message

"Timeliness is next to ..." Kelly Johnston has set the East Bay Estate Planning Council's new program year right on track with a topic that is as current as this morning's newspaper ink. Wherever you spent your summer, you probably couldn't hide from the news of the upset to World markets caused by domestic sub-prime lending. Whether a potential buyer, a seller, a lender, or a bystander, if you have an interest in terra firma, you've had a lot to learn recently. We hope your thirst for up-to-the-minute information will be partly sated by this the first of our new Program Chair's offerings.

Your EBEPCC will continue to bring you topics that educate and stimulate you throughout the year. We hope you will take advantage of these Monday evening opportunities to meet and learn from your peers in the allied estate planning professions. Our objective is to make you more valuable to your clients and more familiar to those who may introduce you to theirs.

If you spot a topic of interest to someone you know in a related field, invite them as your guest. The EBEPCC will subsidize half the cost of their meal.

I hope to see you at Scott's on the 10th at 6:00 or 6:30 PM.

– Tim Smallsreed

“Management of Fiduciary Real Estate: Taming an Unruly Asset Class”

If your clients' net worth warrants creation of a trust, chances are, they own real estate. Despite the current uncertainty in the real estate market, the asset class is here to stay and is an integral part of our clients' trust portfolios. Whether you act as Trustee or provide professional advice to Trustees, you won't want to miss this informative presentation on the obligations, risks, and considerations in managing fiduciary real estate.

Rory Campbell, partner with Hanson Bridgett in San Francisco, has over 25 years of transactional experience in helping clients acquire, develop, finance, lease, manage and transfer real property interests, and has represented numerous Trustees. **David W. Baer** has practiced at Hanson Bridgett since 1982 and heads the firm's trust and estate litigation group. David represents charitable and non-

profit entities, financial institutions and individuals in a broad array of matters, including will and trust contests, fiduciary litigation, and real estate litigation.

Mr. Campbell and Mr. Baer will be focusing on potential blind spots in managing real estate assets, including the economics of real estate as a trust investment, due diligence, environmental issues, and transactional black ice. They will also discuss property management, exposing “traps” in lease agreements, risk management considerations, and dispute resolution approaches.

Please come prepared with your most recent fiduciary real estate challenges, as this will be an interactive presentation in which you are invited to share your war stories.

Monday, September 10, 2007

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 “EBEPCC” and mail to Bonni in the enclosed return envelope before Thursday, September 6th or call 925.686.4819

Meeting Sponsored By:

Redge Martin
Harvey Clars Auction Gallery
5644 Telegraph Avenue
Oakland, CA 94609
510.428.0100

Dues are Due!

If we haven't yet received your dues, an invoice is enclosed. If we have, Thank You!

Visit us at www.ebepc.org