

No More Years

A normal refrain during the re-election of a governmental executive officer is “four more years!” In our simple nonprofit organization of the Estate Planning Council of Diablo Valley, the call instead is “no more years.” Yes, at this time of the year, we open nominations for three positions on the board of directors. Board terms are normally two years unless one is willing to continue on the “executive” path which is normally an additional five years (i.e., treasurer to chairman of the board). You can find the details in Article VII of the Bylaws.

Please contact any of the following individuals with your nominations by the deadline of **April 6, 2007**:

Douglas Bohne	925.926.0300
Kevin Gahagan	415.788.1952
Rob Silverman	925.838.2090
Margaret Greene	925.296.3657
Georgia Cockerham	707.745.1172

If you are late contacting the above individuals, any five active members may nominate a candidate for officers or members of the Board of Directors by written notice to the Secretary, Ken Williams, by May 1, 2007. (See Bylaws, Art. VII, ¶3)

Serving on the Board of Directors is a rewarding experience in helping to continue a great tradition of education and camaraderie. We look forward to volunteers stepping forward.

- Douglas B. Bohne

“Wills of the Rich and Famous”

While the recent litigation surrounding Anna Nicole Smith’s estate may appeal to our prurient interest, there are better lessons learned through a review of other, less well publicized estates (of the equally rich and no less famous). As our April Speaker, **Jere Doyle** points out, a review of these estates provides an interesting overview of techniques used to address practical problems (multiple probates, will contests) along with wealth examples of more complex estate planning strategies (family trusts, CLATs and QDOTs). While the rich and famous may not be fundamentally different than the rest of us, their estates are more interesting.

Jere is an estate planning strategist for Mellon Private Wealth Management

Group and a Senior Vice President of Mellon Financial Corporation. He is admitted to practice law in the Commonwealth of Massachusetts and before the United States District Court, United States Court of Appeals (First Circuit), United States Tax Court. He formerly served as a member of the Massachusetts Joint Bar Committee on Judicial Appointments. He is also the editor and co-author of *Preparing Fiduciary Income Tax Returns*, and a co-author of *Preparing Estate Tax Returns, Understanding and Using Trusts and Drafting Irrevocable Trusts in Massachusetts* all published by Massachusetts Continuing Legal Education. Jere received a LL.M. in banking law from Boston University Law School, a LL.M. in taxation from Boston University Law School, and his JD from Hamline University Law School. He is a past president of the Boston Estate Planning Council and was a 20-year member of the Executive Committee of the Essex County Bar Association.

Join us for a wonderful evening!

Wednesday, April 18, 2007

*Lafayette Park Hotel
3287 Mt. Diablo Blvd.
Lafayette*

6:00 PM NO HOST BAR
6:30 PM Dinner and Speaker

Cost: \$36.00 dinner (if mailed in)
\$41.00 (at the door)

(Please note: New 2007 Prices)

Reservations and cancellations must be received by Monday, Apr. 16th, at 1:30 p.m. to be assured of a reservation. Please send your check in the enclosed envelope today! or call Bonni at:

925.686.4819

Welcome East Bay Area Councils!! Remember that our April meeting is combined with the Tri-Valley and East Bay Estate Planning Councils. Be sure to extend a hand of fellowship to our guests.

Visit us online – www.epcdv.org