

President's Message

If you missed it, September's meeting was a "sold out" affair with virtual standing room only to hear Frayda Bruton discuss the intricacies of planning strategy in entity transfers. The handout Frayda provided was in itself worth the price of admission. With the program line up planned for the coming year, you'll want to be sure that you don't miss a meeting.

For those of you who haven't yet gotten out of summer vacation mode, membership dues are now past due. We are fast approaching the absolute deadline for having your membership information included in our "Membership Roster." If you're planning on remaining an active member, it's now or never — *don't make me call you!*

Having ridden the woes of the credit markets over the past months, it has been encouraging to see the markets exhibiting a greater degree of stability of late. While it would be nice to say we're "out of the woods," there are enough legitimate concerns present that it's safe to say we'll continue to have our challenges. Who wants boring markets anyway?

Football season has resumed, the baseball playoffs are upon us and the presidential primaries will be heating up soon. Those of us with speculative fever have no shortage of races to handicap. Alternatively, you could always invest in the market.

- Kevin Gahagan

"Charitable Provisions of the Pension Protection Act of 2006"

The Pension Protection Act created sweeping changes in the way in which philanthropic giving is regulated by the Internal Revenue Code. Donor advised funds have been significantly affected as have supporting foundations. Some charitable giving provisions expanded opportunities for donors, but there are many changes to the law which tightened up the rules for charitable deductions. Jill S. Dodd will discuss the changes in the philanthropic landscape caused by the Act.

Ms. Dodd is a shareholder at Steefel, Levitt & Weiss. Her practice focuses on the representation of charitable organizations and other nonprofit entities and wealth transfer planning for high net worth individuals, with an emphasis on planned charitable giving. She received her B.A. from Oberlin College (Phi Beta Kappa, With Highest Honors) an M.A. in American History from Harvard University and her J.D. from the University of

California, Boalt Hall School of Law.

Ms. Dodd is a member of the State Bar of California and is President of the Northern California Planned Giving Council. In addition, she is a member of the Bar Association of San Francisco, the San Francisco Estate Planning Council and the Professional Subcommittee of the Jewish Community Foundation.

November 14, 2007
NOTE: 2nd Wednesday

Bill Burke

Life Insurance: Still Relevant in Estate Planning?

January 16, 2008

Don Read

Gift and Estate Tax Issues and Strategy for Domestic Partners

Join us at www.epcdv.org

Wednesday, October 17, 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)

Reservations and cancellations must be received by Monday, Oct 15th, 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

Dues Are Due!

*If we **haven't** received your dues, an invoice is enclosed.*

No Invoice? No Owe. No Problem.

If you DO owe and

Want to pay by credit card online?

www.acteva.com/go/epcdv