

The Marin County Estate Planning Council
is proud to present

Richard J. Boyer, CLU, ChFC
Boyer & Cobert Financial Group

With an introduction by

James L. Walker, IV, Esq.
DeMartini & Walker LLP

*“Trust Owned Life Insurance:
From Here to Eternity (or Maybe Not)”*

With interest/dividends dropping, many insurance policies are now in jeopardy, something the CPA, Attorney or Trustee may be unaware of due to limited information in annual reports. Mr. Boyer will address what is happening, how to assess the status of a policy, and offer up a tool kit designed to help keep the advisor/trustee out of trouble. His topics will include: Responsibilities of the Trustee, Risk of Policies Imploding or Requiring More Premium Due To Poor Performance, Strategies to Review/Stabilize Policies, and Life Settlement Options. His presentation will be hands on and interactive. This may be one of the most important meetings you will attend this year. Mr. Boyer, a member of the MCEPC, is a principal in the Boyer & Cobert Financial Group, a full service financial planning firm in Marin County.

Mr. Boyer will be preceded by James L. Walker, IV, (Jake) a principal with the law firm of DeMartini & Walker LLP, and also a member of our Council. Mr. Walker will address the following questions--You've said to one of your trusted clients: "Sure, I'll be your ILIT trustee." Exactly what have you signed up to do? What do you do first?

Wednesday, March 11, 2009

LOCATION: Jason's Restaurant 300 Drakes Landing Road – Greenbrae

5:30 pm – Social hour

6:15 pm – Dinner

(House Salad, Brandy Chicken, Vanilla Ice Cream w/ Chocolate Sauce)

7:00 pm– Program

TO BRING A GUEST or make a menu substitution (vegetarian or vegan are the only available substitutions), please notify Sherrill Schaefer at sherrillschaefer@raubbrock.com or 415 381-3555.

Notification must be received no later than 10:00 AM on Monday, March 9th

The guest fee is \$45.00, due and payable by check or cash at the meeting.

President's Message

To the members of the Marin County Estate Planning Council:

I am very pleased to announce our March speakers—Rick Boyer, speaking on the functions that the trustee of an Irrevocable Life Insurance Trust should perform, how to go about them, and alternatives when the trustee concludes that the life policy is not performing as it should. Rick will be preceded by Jake Walker, speaking on the role of the trustee, including what to look for in the draft document before agreeing to become the trustee.

Rick graduated summa cum laude from Indiana University in Bloomington, Indiana in 1971, and received the distinction of Phi Beta Kappa. Rick received his Chartered Underwriter and Certified Financial Consultant designations from the American College in Bryn Mawr, PA.

Rick has been practicing insurance and financial services in Marin County since 1978, specializing in business succession and continuation, retirement and strategic estate planning. His firm also assists clients in accumulating, protecting and preserving their net worth.

Jake has been practicing law in Marin County since 1976. He grew up in San Francisco, graduated from University of Virginia, got his JD at Hastings College of the Law and MBA(tax) from Golden Gate University and now lives with his wife and three daughters in Kentfield, California.

Professionally, he has been an attorney since 1976 and is qualified as a California State Bar Certified Specialist-Estate Planning, Probate and Trust Law. Jake's practice emphasizes Estate Planning, Probate, & Trust Administration; Wills & Trusts; Charitable Giving Arrangements; Liability Protection Planning; Tax Reduction Strategies; Business Entities Formation and Operations; Real Estate Sales and Financing Transactions; Other Business, Contract & Transactional Matters. Jake has served on a number of community, civic, and charitable boards.

This month's bullet items:

- Craig Slayen of Winship Park Asset Management, LLC is our wine sponsor for this March meeting, leaving only the May meeting available for this fiscal year—contact Aviva if you are interested.
- Sherrill Schaefer is our new administrator, and can be reached through Dave Raub's office. Many of you know Sherrill, who has so capably hosted the reception table at our meetings. She will now take care of the many duties that keep our organization running smoothly. Welcome aboard, Sherrill!
- Remember to call in your guests by the 10 AM deadline the Monday before the meeting.

I look forward to seeing each of you at Jason's on March 11th.

Douglas G. Paul
President

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Please mark your calendars with our last upcoming meeting of the
2008-2009 year!

May 13, 2009