



Marin County Estate Planning Council

November 11, 2009

Tips and Traps for Advising LGBT Clients

- *How should you advise clients in a world of legal uncertainty?*
- *Should those married in other jurisdictions file as married for California State income tax purposes?*
- *Should married couples also register as Domestic Partners?*

Hear from a panel of experts about the new challenges advisors are facing as the legal landscape continues to change and professional advisors move into uncharted territory. Relationship recognition DOES matter from an advisor's point of view, for legal, tax, and financial planning.

The panel will include Deb L. Kinney, Estate Attorney, DLK Law Group PC; Chris Kollaja, Partner, A.L. Nella & Company; and a representative of the Horizons Foundation, San Francisco.

*This will be an interactive discussion among advisors about the complexities caused by having differing legal designations for couples, and the implications for your practice. **You are invited to submit case studies or specific questions in advance.** Send your questions or cases to boedecker.a@gmail.com.*

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

5:30 p.m. – Social Hour

6:15 p.m. – Dinner

7:00 p.m. – Program

NEW PROCEDURE: RSVP to Sherrill Schaefer, sherrill@mcepc.org or (415) 381-3555 by *Monday, November 9 at 10:00 a.m.* The entrée will be chicken. You may request a vegetarian or vegan meal when you RSVP.

TO BRING A GUEST: Please notify Sherrill Schaefer, sherrill@mcepc.org, by *Monday, November 9 at 10:00 a.m.* The guest fee is \$45.00, payable at the meeting.