



Marin County Estate Planning Council

President's Message

To the members of the Marin County Estate Planning Council:

Welcome back to the MCEPC fall season! This September we are happy to welcome four new members: David J. Clark, Joni Fritsche, Robert A. Kosbie, and Richard C. Smith. Thanks to all of you who have been inviting guests and encouraging colleagues to join the Council.

UPCOMING PROGRAMS

On **September 15**, at our **new meeting location** at the Four Points by Sheraton in San Rafael, we are pleased to have as our speaker Richard A. Oshins, a nationally noted attorney and speaker on innovative estate planning strategies and issues. His presentation last year before the Redwood Empire Estate Planning Council was enthusiastically received. His subject for our September 15 meeting will be "The Beneficiary Defective Inheritor's Trust." Thanks to Mike Schlegel, who arranged for Mr. Oshins' presentation, and who is our wine sponsor for the event.

Please see the attached meeting notice, with more information on the speaker, the time and new location of the meeting, and the reservation procedure.

Our **November 10** meeting will feature Mary-Alice Cardenas of Bank of America. Her presentation will cover what every estate planner didn't know they needed to know about reverse mortgages. Although these programs have been associated with abusive sales practices in the past, recent changes to the way reverse mortgages work can open some surprising estate planning opportunities for older homeowners.

WEBSITE INFORMATION

You can always find information about meetings and membership on our website, as well as links to other Councils in the area and resources that you may find useful. The membership directory is online in the members-only section of the site. To access the members-only portion of the site, enter our **username: mcepc** and **password: service**.

THE NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS NATIONAL CONFERENCE

The 47th Annual Conference is scheduled for **November 17-19, 2010**, in San Diego, California, and all members are invited to attend. Details can be found at www.naepc.org.

National Membership Benefits: NAEPC offers us many benefits, programs and services, in categories such as software; educational programs; subscriptions; publications; marketing; and more. The full list is available at www.naepc.org. For access to the members-only portions of the website, enter our username: **marin** and our password: **epcmember**

I look forward to seeing all of you at the September meeting.

David Raub
MCEPC President

Marin County Estate Planning Council

September 15, 2010 meeting

"THE BENEFICIARY DEFECTIVE INHERITOR'S TRUST ("BDIT") A POWERFUL WEALTH PLANNING STRATEGY"

RICHARD A. OSHINS, OSHINS & ASSOCIATES, LLC

Richard A. Oshins is a member of the Las Vegas law firm of Oshins & Associates, LLC, where he concentrates in tax and estate planning with a substantial emphasis on multi-generational wealth planning, particularly with regard to closely held businesses. Mr. Oshins has been an advisor and consultant to many of the largest financial institutions in the U.S. He has lectured extensively on innovative tax and estate planning strategies and is the author or co-author of many articles, including the "Practitioners' Strategies" column of the CCH Estate Planning Expert Library, which provides practice-focused commentary on hot topics, emerging issues and trends pertinent to practitioners in the estate planning and related fields. Prior to coming to Nevada, Mr. Oshins served as a law clerk for the U.S. Court of Claims in Washington, D.C., and as an Attorney-Advisor in the Office of the Tax Legislative Counsel, U.S. Treasury Department.

LOCATION: Four Points by Sheraton, 1010 Northgate Drive, San Rafael

5:30 p.m. – Social Hour

6:15 p.m. – Dinner

7:00 p.m. – Program

Please RSVP to Sherrill Schaefer, sherrill@mcepc.org or 415.381.3555 by **Friday, September 10 at 4 pm**. The entrée will be salmon. You may request a portobello mushroom vegetarian or vegan meal when you RSVP. **To bring a guest:** Notify Sherrill Schaefer, sherrill@mcepc.org by **Friday, September 10, at 4 pm**. The guest fee is \$45.00, payable at the door by check or cash only. Please remember to cancel your reservation if plans change.

