



# Marin County Estate Planning Council

## *President's Message*

To the members of the Marin County Estate Planning Council:

On behalf of the Board of Directors, welcome back to the Marin County Estate Planning Council. Your Board has made several innovations for the coming year, including an updated website; RSVPs for the meetings; and improvements to the meeting check-in procedure, and we have planned a stellar schedule of programs.

Your Board members for this year are: President – Aviva Shiff Boedecker; Vice-President – David Raub; Secretary – John Hammond; Treasurer – Tom Jacobsen; and Vince Crivello, Doug Paul, Jake Walker and Daryl Weinroth. We all look forward to seeing you at the upcoming meetings, and to getting to know those of you with whom we may not yet be acquainted.

I would like to acknowledge Cynthia Cannam, Eda Cole and Ted Hellman, who have retired from the Board after each serving multiple terms and contributing so much of their time, talent and energy to the Council.

Our first meeting, on September 9, will feature Frank Dubreuil, who will discuss ***Today's Wealth Transfer Planning Opportunities and Challenges***. The complete meeting notice, with details about the program and RSVP instructions, is attached.

The November 11 program is ***Tips and Traps for the Advisor Post Prop 8***. We will hear from a panel including an attorney, a CPA and a financial advisor about how the differences in relationship recognition matter from an advisor's point of view, whether it be legal, tax or financial planning, and suggestions for advising clients in an environment of legal uncertainty.

In January E. Lynn Perry, an intellectual property attorney, will talk with us about patents, copyrights, trademarks and other forms of intellectual property, and how to protect their value.

We are also planning a program on art and other collectibles in the estate plan, and a program on tax law changes – if there is anything to talk about!

### **Notable changes for this year:**

- I am happy to announce that we have been able to keep dues at \$200, the same as last year. Your annual dues include dinner and wine for all five meetings. However, **this year we are asking members to RSVP for each meeting**. Your RSVPs will help us control expenses by allowing us to work with the restaurant more efficiently. You will



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- be able to request vegetarian/vegan meals and make reservations for guests when you RSVP.
- **Streamlined check-in procedure.** Members who have RSVP'd will be able to pick up their name tags more quickly.
- **Streamlined Continuing Education sign-in.** We will prepare Continuing Education sign-in sheets that already have members' names and license numbers, so you will only have to sign your name on the appropriate line. Please be sure to note your professional license number on the membership renewal form.
- **Website improvements.** To provide a resource for the general public, and to help our members with business development, we will list the names of all members on a portion of the website that is accessible to the public. With your permission, your email address and website will also be listed. *Contact information will be made public only if you OPT IN on the membership renewal form.*

**Wine Sponsorship Program.** Cheryl Lane is our Wine Sponsor for the September meeting. Please consider supporting your Council by claiming one of the remaining slots for this year. To reserve a meeting, or for more information, you may contact Board members Jake Walker at [jlw4dw@sbcglobal.net](mailto:jlw4dw@sbcglobal.net) or 415.472.7880, or Doug Paul at [doug@dougpaul.com](mailto:doug@dougpaul.com) or 415.897.5678, ext. 135.

Our meetings will again be the second Wednesday of alternate months at Jason's Restaurant, 300 Drakes Landing Road in Greenbrae. As before, the social hour begins at 5:30 p.m., dinner will be served at approximately 6:15 p.m., the program will begin at 7:00 p.m., and the meeting will conclude at 8:30 p.m. Please mark your calendars for: **September 9, 2009; November 11, 2009; January 13, 2010; March 10; and May 12, 2010.**

We welcomed 16 new members to the Marin County Estate Planning Council during 2008-09, and the Board encourages you to invite your colleagues to attend a meeting as a guest. The guest fee will remain at \$45. Remember – you will be rewarded with a bottle of wine when your “protégé” becomes a member! (To avoid awkward situations, please review the membership guidelines prior to nominating anyone for membership.) All information regarding the council, including membership guidelines and application forms, is online at [www.mcepc.org](http://www.mcepc.org).

Sherrill Schaefer will continue to serve as our administrator and manage the meeting check-in table. Please contact Sherrill with any website or other questions at [sherrill@mcepc.org](mailto:sherrill@mcepc.org) or 415.381.3555.

A gentle reminder: If you have not yet returned your annual dues with the update form that was mailed to you in July, please do so now. If you need a copy of the dues notice and update form, where you may note any changes, additions, or corrections to your personal information, and opt in or opt out of having your contact information in the



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public portion of the website, please email Sherrill at [sherrill@mcepc.org](mailto:sherrill@mcepc.org). Please return the update form with your dues by September 3.

We look forward to seeing you on Wednesday, September 9th at Jason's, for the start of another great year. Meanwhile, enjoy the remainder of the summer!

Sincerely,

Aviva Shiff Boedecker  
President



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September 9, 2009

### *Today's Wealth Transfer Planning: Opportunities and Challenges*

#### **Francis W. Dubreuil**

National Managing Director, Wealth Management Group  
Bernstein Global Wealth Management

**Francis W. Dubreuil** is a National Managing Director in the Wealth Management Group at Bernstein Global Wealth Management. Prior to joining the firm in 2006, he was a partner with the Palo Alto, California, law firm Wilson Sonsini Goodrich & Rosati, P.C., where he was a member of the estate planning and wealth management practice and served as chairman of the firm's tax services group. Before joining Wilson Sonsini in 1996, Mr. Dubreuil was with Goodwin Procter in Boston, where he served as chairman of the estate planning practice, co-chairman of its private business group, and as a member of the executive committee. Mr. Dubreuil earned a B.A. from Boston College, a J.D. from Harvard Law School and an M.S. from the Stanford University Graduate School of Business.



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The presentation will address wealth transfer planning opportunities and challenges in the current economic and legislative environments, in particular given today's low interest rates and depressed asset values, and the prospects for federal estate tax change.

Continuing education credit will be offered.

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

5:30 pm – Social Hour

6:15 pm – Dinner

7:00 pm – Program

**NEW PROCEDURE: RSVP** to Sherrill Schaefer, [Sherrill@mcepc.org](mailto:Sherrill@mcepc.org) or (415) 381-3555 by Monday, September 7 at 10:00 a.m. The entrée will be fish. You may request a vegetarian or vegan meal when you RSVP.

**TO BRING A GUEST:** Please notify Sherrill Schaefer, [Sherrill@mcepc.org](mailto:Sherrill@mcepc.org), by Monday, September 7 at 10:00 a.m. The guest fee is \$45.00, payable at the meeting. Please pay by check if possible.