



**Date:** Wednesday, March 19, 2008  
**Location:** The Omni Hotel, 500 California at Montgomery, San Francisco  
**Time:** 5:30 PM No Host Bar; 6:00 PM Dinner  
**Topic:** Delaware Trusts: Safeguarding Personal Wealth  
**Speaker:** Daniel F. Lindley  
President, The Northern Trust Company of Delaware

Prior to joining Northern Trust, Dan served as Managing Director and Trust Counsel for U.S. trust Company of Delaware. Before that, Dan was engaged in the practice of law in Delaware for nearly twenty-five years. During that time, he assisted institutional clients with fiduciary product development and litigation, as well as the enactment of Delaware legislation dealing with fiduciary law. In that role, he was the principal author in 1997 of Delaware's asset protection trust statute and the 1995 legislation repealing Delaware's Rule Against Perpetuities.

Dan holds a J.D. degree from the University of Virginia School of Law and a B.A. degree, magna cum laude, from Williams College. He is admitted to the bars of the Supreme Court of the State of Delaware and the United States Supreme Court.

Join us in welcoming Dan to our March meeting where he will discuss the many benefits of establishing a trust in the State of Delaware including: administrative and investment flexibility, savings on fiduciary income taxes, Dynasty Trusts, Asset Protection Trusts, and Confidentiality.

**Continuing Education Credit:**

*MCLE:* The San Francisco Estate Planning Council is a State Bar of California approved Provider.

*CPA & CFP®:* A sign-in sheet and an attendance certificate are provided at each meeting.

**Excused Absence:**

Members can request an excused absence by mailing a letter, or sending an email (association\_office@att.net) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.

**San Francisco Estate Planning Council Reservation for March 19, 2008**

Member Name \_\_\_\_\_

Guest Name \_\_\_\_\_

*Reservations and cancellations must be received by Monday, March 17, by 1:30 p.m.  
to be assured of a dinner or refund, respectively.*

*Please send your check in the enclosed envelope today! or call Bonni at:*

**925.686.4819**

**Mail In Registration: \$50 per member; \$60 per guest  
At the Door (reservation still needed): \$55 per member; \$65 per guest**