



San Francisco Estate Planning Council

Invites you to a timely program with technical and practical insights for all estate planning disciplines:

SPEAKER: John W. Porter, Esq. Partner, Baker Botts LLP

The speaker for both programs is Mr. John W. Porter. John Porter, a senior partner in the law firm of Baker Botts, L.L.P., Houston, TX, primarily handles federal gift, estate, and income tax litigation and controversy work; John also manages a substantial fiduciary litigation practice. He is nationally recognized for his expertise in representing taxpayers before and against the IRS in estate and gift tax controversies, especially those involving hard-to-value assets. John has served as lead counsel for taxpayers in numerous cases in the United States Tax Court, the Court of Federal Claims, and United States District Courts and Courts of Appeals. He is a Regent and a Fellow of the American College of Trust and Estate Counsel and is the Supervisory Council Member and the former Chairman of the Tax Litigation and Controversy Committee of the Real Property, Probate and Trust Law Section of the American Bar Assn. An engaging speaker, he has made presentations to professional associations such as ours across the country.

Afternoon Program – CURRENT VALUATION ISSUES

EPC Member - \$125.....Guest - \$130

**3:15 pm Registration
3:30 – 5:30 pm Program**

**A.P. Giannini Auditorium
Bank of America Building, 555 California St.**

The afternoon program will offer a comprehensive presentation by John Porter, one of the most respected and knowledgeable experts in the country on valuation issues. John will analyze IRS positions regarding family limited partnerships and LLCs and present defenses to those arguments. He will discuss recent case law, including *Christiansen* and *Morowski*, and others; defined value or formula transfer issues; various valuation issues; privileges in the estate planning context; and related matters.

Evening Program – CURRENT VALUATION ISSUES: LOOKING FOR A SENSE OF THE COURTS

EPC Member \$100Guest - \$110

**5:30 pm Registration & Reception
6:00 – 8:00 pm Dinner/Program**

**Omni Hotel
500 California St. at Montgomery**

The evening program will continue the afternoon presentation. The evening program will not repeat the subjects discussed in the afternoon.

Continuing Education Credit: MCLE: The San Francisco Estate Planning Council is a State Bar of California approved Provider. We are also an approved provider through the CFP® Board of Standards. Participants will receive credit as follows: afternoon program – two hours; dinner program – one hour. CPA & CLU: A sign-in sheet and an attendance certificate are provided at each meeting.

****Turn the page for Program Registration****

WELCOME ESTATE PLANNING COUNCILS!

East Bay Estate Planning Council
Estate Planning Council of Diablo Valley
Marin County Estate Planning Council
Tri Valley Estate Planning Council
Santa Clara Estate Planning Council
Peninsula Estate Planning Council
Sacramento Estate Planning Council

San Francisco Estate Planning Council Reservation for Thursday, May 22, 2008

Council Member Name _____

Council with which you are affiliated _____

- Afternoon Program at \$125
 Evening Dinner/Program at \$100
 Both sessions at \$175

Your Guest's Name _____

- Afternoon Program at \$130
 Evening Dinner/Program at \$110
 Both sessions at \$185

Total Enclosed _____

Mail your check early and payable to San Francisco Estate Planning Council (SFEPC) in the enclosed envelope, or to 781 McKean Place, Concord, CA 94518-2835.

Excused Absence for SF Council Members:

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

SFEPC BOARD ELECTION

At the May meeting, all members in good standing will be entitled to vote to fill four vacancies on the Board of Directors for three year terms beginning July 1, 2008. The nominees are:

Mary Dingman
Jack Caldwell
Michael Burnstein
Sandy Price