



San Francisco Estate Planning Council

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

Wednesday, January 21, 2009

Lou Mezzullo, Esq.

Partner, Luce Forward Hamilton & Scripps LLP

The speaker for both programs is Lou Mezzullo. Lou is a partner in Luce, Forward, Hamilton & Scripps LLP, practicing principally out of its Rancho Santa Fe CA office. His principal areas of practice are taxation, estate and business planning, and employee benefits. He was an adjunct Professor of Law at the University of Richmond Law School from 1978 to 2006, where he taught courses in those subjects and was on the faculty of the University Of Miami School Of Law Graduate Program in Estate Planning from 2004 until 2007. He also lectures for the Continuing Legal Education Committee of the Virginia Bar Foundation. He is listed in *Who's Who in American Law*, *Who's Who in Emerging Leaders* and *Who's Who in America* (Marquis Who's Who Publishers) and in *The Best Lawyers in America* (for tax, employee benefits and trust and estates) (Woodward/White Publishers). He has written numerous articles on the subjects of taxation, estate planning and employee benefits and speak nationally on these subjects.

Afternoon Program – Planning For the Business Owner: “What’s Hot and What’s Not”

EPC Member - \$100.....Guest - \$110

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

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

In the afternoon session, Lou Mezzullo, one of the nation’s leading experts on estate planning for the closely held business owner, will provide current practical advice on planning for the succession of your client’s business interests to the next generation. The program will review the use of buy-sell agreements and include a discussion of relevant valuation issues, tax considerations and latest developments. Lou will also cover recent cases involving FLPs, including Mirowski, Holman, and Gross.

Evening Program – Planning For the Business Owner: “What’s Hot and What’s Not”

EPC Member - \$65.00.....Guest - \$70.00

**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.

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

WELCOME ESTATE PLANNING COUNCILS!

East Bay Estate Planning Council
Marin County Estate Planning Council
Tri Valley Estate Planning Council
Peninsula Estate Planning Council
Sacramento Estate Planning Council

San Francisco Estate Planning Council Reservation for Wednesday, January 21, 2009

Council Member Name _____

Council with which you are affiliated _____

- Afternoon Program at (\$100)
 Evening Dinner/Program at (\$65)
 Both sessions at (\$150)

Your Guest's Name _____

- Afternoon Program at (\$110)
 Evening Dinner/Program at (\$70)
 Both sessions at (\$160)

Total Enclosed _____

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

Or – to pay by credit card go to www.acteva.com/go/sfepec .

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.

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.