



Date: Wednesday, March 18, 2009
Location: The Omni Hotel, 500 California at Montgomery, San Francisco
Time: 5:30 PM No Host Bar; 6:00 PM Dinner
Topic: “Private Foundations: What You Need To Know”
Speaker: Erik Dryburgh

Erik Dryburgh is a principal in the law firm of Adler & Colvin, a law firm specializing in representing nonprofit organizations and their donors. He has an undergraduate business degree from the University of Wisconsin at Madison, and earned his J.D. at the University of California at Berkeley, Boalt Hall. He is also a Certified Public Accountant. Erik’s areas of expertise include charitable giving, charitable estate planning, and not-for-profit organizations.

Erik has authored the chapter “Charitable Remainder Trusts,” in *California Estate Planning*, Continuing Education of the Bar (2002) and published numerous articles on charitable gift planning. He is a co-editor of The Charitable Gift Planning News. Erik is a member of the Board of Directors of the National Committee on Planned Giving, and a past Board member of the San Francisco Estate Planning Council and the Northern California Planned Giving Council. Erik received the 2005 Phil Hoffmire Service Award from the Northern California Planned Giving Council, and is a fellow of the American College of Trust and Estate Counsel (ACTEC).

A family foundation is often a cornerstone of a high net worth family’s estate plan. This session will review the key issues present in forming a family foundation: selecting trust or corporate form; applying for tax-exempt status; limitations on foreign grant making and individual scholarships; the income tax deduction rules applicable to donors; the Chapter 42 excise tax restrictions applicable to private foundations; and the foundation’s on-going filing obligations.

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 18, 2009

Member Name _____

Guest Name _____

*Reservations and cancellations must be received by Monday, March 16th, by 1:30 p.m.
to be assured of a dinner or refund, respectively.*

Please pay online with a credit card - www.acteva.com/go/sfepec

Or send your check to “SFEPCC” at the address below

Mail In Registration: \$60 per member; \$65 per guest

At the Door (reservation still needed): \$65 per member; \$70 per guest