



Date: TUESDAY, September 15, 2009

Location: The Omni Hotel, 500 California at Montgomery, San Francisco

Time: 5:30 PM No Host Bar; 6:00 PM Dinner

Topic: “The Top Thirty Personal And Business Insurance Planning Mistakes – and How to Avoid (Or At Least Fix) Them”

Speaker: Lawrence Brody, Esq., Partner, Bryan Cave LLP, St. Louis

Lawrence Brody, one of the most respected and knowledgeable experts in the country on insurance planning, will review the most common insurance planning mistakes as seen in his more than 40 years in private practice. From simple mistakes such as not naming a successor beneficiary of a policy to more complex mistakes such as changing a compensatory pre-Final Regulation split-dollar arrangement without considering if it is a material modification, Larry will tell us how to avoid insurance mistakes and if necessary how to fix them.

Mr. Brody focuses his practice on estate planning for high net worth individuals and the use of life insurance in estate and non-qualified deferred compensation planning. He has authored two BNA Tax Management Portfolios, two books for the National Underwriter Company and is a frequent lecturer at national conferences on estate and insurance planning. He is an adjunct professor at Washington University School of Law and a visiting adjunct professor at the University of Miami School of Law. Mr. Brody received the designation of Accredited Estate Planner by the National Association of Estate Planners and Councils, and was one of ten individuals awarded its Distinguished Accredited Estate Planner designation in the initial class, in 2004.

Next Meeting Date: Wednesday, November 18, 2009

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.

Member Name _____

Guest Name _____

Reservations and cancellations must be received before Friday, September 11th, at Noon to be assured of a dinner or refund, respectively.

Please pay online with a credit card - <https://www.123signup.com/event?id=jzvpp>

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

Questions? Call Bonni at:925.686.4819

Mailed Registration: \$60 per member; \$65 per guest

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