San Francisco
Estate Planning Council

Date: Wednesday, January 20, 2010

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

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

Topic: Charitable Planning and Drafting in 2010 and Brief Discussion of the State of Estate Tax Legislation

Speaker: B. Howard Pearson, Esq., Development Legal Counsel & Senior Philanthropic Advisor, Stanford University

The presentation will begin with a discussion of the current state of estate tax legislation and its impact on estate planning and drafting, followed by a focus on timely charitable planning and drafting issues. Topics will include philanthropic planning in a low interest rate environment, use of retirement plans and impact of Roth IRA changes, CLATs and CRATs in danger of exhaustion because of negative investment returns, selected CRT issues (selecting payout rate, midterm termination, drafting tips), and charitable pledges (should they be legally binding), role of donor advised funds and private foundations & drafting ideas.

B. Howard Pearson is Senior Philanthropic Advisor and Development Legal Counsel at Stanford University and a lecturer at the Stanford Law School where he teaches two courses: "Trusts and Estates" and "Estate Planning." After graduating from Stanford University in 1976, he received his Juris Doctor from the University of Utah College of Law in 1979. Following law school and a federal judicial clerkship, he joined the firm of Brobeck, Phleger & Harrison in San Francisco and Palo Alto where he was an associate and partner in the field of estate planning for fifteen years before joining Stanford in 1995. Mr. Pearson has served regularly on panels and committees of the American, State and local Bar Associations. He has been a faculty member of the Practicing Law Institute's Annual Estate Planning Institute since 1993 and is also a co-editor of ***California Probate Practice***, published by Matthew Bender.

Next Meeting Date: Wednesday, March 17, 2010

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, January 15th, at Noon to be assured of a dinner or refund, respectively.

Please pay online with a credit card **https://www.123signup.com/event?id=jhdvz**

Or send your check to "SFEPC" at the address below

Questions? Call Bonni at: 925.686.4819

Paid Pre-registration: $60 per member; $65 per guest

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

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