



Date: Wednesday, May 19, 2010
Location: The Omni Hotel, 500 California at Montgomery, San Francisco
Time: 5:30 PM No Host Bar; 6:00 PM Dinner
Topic: "The Most Compelling Estate Planning Opportunities Today"
Speaker: Paul S. Lee, JD, LLM, National Managing Director,
Bernstein Global Wealth Management

Last year, fears of another depression drove down asset values, as investors fled to the safety of Treasuries and risk premiums widened to historic levels. It created the greatest environment for wealth transfer, but many clients were too paralyzed to act. Now that markets have recovered somewhat and the estate tax laws are in chaos, what now? This presentation will discuss the most compelling wealth transfer planning techniques today, based upon the current state of the capital markets and anticipated tax law changes. It will discuss new twists on well-trodden techniques, along with cutting-edge innovative planning being used today.

About the Speaker - Paul S. Lee is a National Managing Director of Bernstein Global Wealth Management and a member of the firm's Wealth Management Group. He was previously a partner in the Atlanta-based law firm of Smith, Gambrell & Russell, LLP. He received a BA, cum laude, in English and a BA in chemistry from Cornell University, and a JD, from Emory University School of Law, where he was notes and comments editor of the Emory Law Journal; he also received an LLM in taxation from Emory University. Mr. Lee was the recipient of the Georgia Federal Tax Conference Award for Outstanding Tax Student and the Ernst & Young Award for Tax and Accounting. A frequent lecturer and panelist on investment planning and tax and estate planning, Mr. Lee has spoken at Heckerling, the ACTEC National Meeting, the ABA Tax-RPTE Joint National CLE Conference, the Southern Federal Tax Institute and many other conference. His articles have been published by Major Tax Planning, Trusts & Estates and the Emory Law Journal.

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, May 14th, at Noon to be assured of a dinner or refund, respectively.

Please pay online with a credit card - <https://www.123signup.com/calendar?Org=sfepc>

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

NOTICE OF ANNUAL MEETING - SFEPCC BOARD ELECTION

The May meeting is the SFEPCC's annual meeting. At the May meeting, all members in good standing will be entitled to vote to fill these positions on the Board of Directors for three year terms beginning July 1, 2010. The nominees are:

- Robert Lew (1st term)**
- Ralph Sklar (1st term)**
- Lilli Alberga (2nd term)**
- Susan Scribner (2nd term)**
- Kathleen Burrv (2nd term)**