

President's Message

All of us know the expression: My, how time flies (when you're having fun)! Only three meetings left, including our June social, and the Council year is over. I began the year with my President's Aspirations List, and in reviewing the long list, realized that I was overly optimistic in being able to attain all my goals. But some of the high priority items have been achieved, and I have the Board and our members to thank. At the top of the list were higher quality programs and the use of some of our reserves to get to that end. Paula has done an excellent job this year, and this month's program for our joint meeting will be the highlight of the year. I am truly sorry to miss this meeting, but my daughter's spring break and our Vallarta vacation timing made it necessary to be away for what will be the most important program of the year.

Another goal was to expand our membership, not just in quantity but in quality as well. Now I am not disparaging our members in the least. I believe our members include some who are at the top of their profession. During our Summer Planning Meeting, we discussed marketing memberships to those who are experts in their field. Please review your contact lists for potential members who may be deserving of this type of recognition.

Paula will be running the April meeting. See you in May. Hasta Lavista - *Bruce H. Coblentz, CPA*
President 2011-2012

Estate and Gift Tax Priorities and Guidance from the U.S. Treasury Catherine V. Hughes, Department of Treasury, Office of Tax Policy

On Wednesday, April 18th, "the" policy voice in the estate and gift tax area for the IRS in Washington D.C. - **Catherine V. Hughes, Estate and Gift Tax Attorney-Advisor, Office of Tax Policy** - is coming to speak to our Council on the current priorities of the U.S. Treasury. She will also give us some insight as to some of Treasury's recent areas of guidance in the estate and gift tax area, including portability. And, we'll have the opportunity to question her.

Catherine V. Hughes is the Estate and Gift Tax Attorney-Advisor in the Office of Tax Policy of the U.S. Department of Treasury. She is responsible for advising the Assistant Secretary of the Treasury (Tax Policy) on all estate, gift, and generation-skipping transfer tax matters. Prior to joining the Treasury Department, Ms. Hughes was a partner in a large law firm, where she managed the estate planning and administration

practice in Northern Virginia, Maryland, and the District of Columbia. Catherine Hughes is a Fellow of the American College of Trust and Estate Counsel, is a past Chair of the Estate and Gift Tax Committee of the ABA Section of Taxation, and is a former Chair of the Estates, Trusts and Probate Law Section of the D.C. Bar. Ms. Hughes received a B.A. in Mathematics from the University of Dayton, and a J.D. from Catholic University.

The East Bay Community Foundation is generously co-sponsoring this event, and also "hosting" our **pre-event at 6 pm** by providing wine and beer, and hors d'oeuvres. **We have also invited the members of three other Estate Planning Councils to this meeting – the East Bay, Tri-Valley and San Francisco –** so come early so you can enjoy the camaraderie. Join Us!

April 18, 2012

*Lafayette Park Hotel
3287 Mt. Diablo Blvd.
Lafayette*

*6:00 P.M. Wine and Registration
6:30 P.M. Dinner and Speaker*

**Cost: \$40.00 dinner (preregister)
\$45.00 (at the door)**

*Reservations and cancellations must
be received by Monday,
Apr 16th at 1:30 p.m., or until sold out*

NO WALK INS AVAILABLE

Please pay with a credit card online

<http://www.123signup.com/calendar?Org=epcdv>

*Transportation from BART in
Lafayette available for this meeting
only! A Hotel Van will be available by
reservation at 5:30, 6:00 and 6:30.
Please reply to this question online
when you register.*