

President's Message

I hope you have noticed the increase in quality of programs we have presented so far this year. Paula has done an outstanding job booking our speakers.

We are excited to have booked a nationally acclaimed speaker from U.S. Treasury, Catherine Hughes, known as the voice of the Treasury when it comes to estate and trust policy matters, for our joint meeting in April. I announced the possibility at the Tri-Valley meeting at Blackhawk earlier this month and we are gauging interest at the East Bay and San Francisco Councils. We may need to change our venue to the Walnut Creek Marriott if interest is in excess of our capacity at the Lafayette Park. Tax Day is Tuesday April 17 due to Emancipation Day in D.C. Please delay post-tax season vacations for one more day to get this meeting on your calendar.

We recently voted on and passed revised By-Laws for our Council. As an unintended consequence of our revised By-Laws, our Member-at-Large category is full and we have a waiting list two to three applicants long. We have room for growth in all other categories: Attorneys, CPAs, CFPs, CLUs/ChFCs, and Trust Officers. Please look through your contacts and invite a potential member in an unimpacted category to a meeting as a guest. See you on February 15.

Bruce H. Coblentz, CPA
President 2011-2012

“Portability: Shifting the Paradigm”

With some degree of fanfare, Congress enacted legislation in 2010 permitting a married individual's unused applicable exclusion amount, formerly known as their “unified credit,” to transfer to their surviving spouse, a concept which has been labeled “portability.” Supposedly, the legislation simplifies estate planning for married couples. But is simplification achieved?

Join us on Wednesday, February 15th to hear what **Trent S. Kiziah**, the Regional Fiduciary Officer for U.S. Trust, Bank of America, and chair of the Transfer Tax Study Committee for ACTEC, has to say about that. Trent's presentation will focus on whether this legislation accomplishes the desired goal of simplification, whether professionals should be recommending portability to their clients, and what professionals should be doing to avoid mistakes.

February 15, 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,
Feb 13th at 1:30 p.m. to be assured of
a reservation.*

Please send your check today!

or

Pay with a credit card online

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

or

call Bonni at:

925.686.4819

Trent S. Kiziah is the Regional Fiduciary Officer for U.S. Trust, Bank of America Private Wealth Management. His duties and responsibilities include providing complex estate planning advice to high net worth clients, educating staff, providing trust/transfer tax support and working with the legal community.

Before joining U.S. Trust, Bank of America, Trent was an estate planning lawyer in private practice and an adjunct professor of law at the University of Miami School of Law, Graduate Estate Planning Masters Program. He has also written and lectured extensively over the course of his career.

Join us and learn!

Mark Your Calendars!

March 21, 2012 – Vivian Brailoff of John Muir on Health Care Directives

April 18, 2012 – Catherine Hughes, U.S. Treasury, Wash. D.C.