

**“Recent Legislative Estate Tax Developments and What Trustees  
Should do About the New Medicare Tax”**

***Join us Wednesday, February 20<sup>h</sup> to hear Michael J. Jones, CPA, discuss “Recent Legislative Estate Tax Developments and What Trustees Should do About the New Medicare Tax”***

2013 has ushered in both federal transfer tax finality and the 3.8 percent Medicare Tax on net investment income, which applies to trusts as well as to individuals. Mike will discuss how these developments will affect our practices. Also, Mike attended the Heckerling Institute on Estate Planning in January and will have lots of information and cutting edge ideas to share with us.

Michael J. Jones, CPA is a partner at Thompson Jones LLP, in Monterey, California. His tax consulting practice focuses on sophisticated wealth transfer strategy, trust and probate matters (both administration and controversy resolution), and family business transitions.

***February 20th, 2013***

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

*6:00 P.M. Wine and Registration*

*6:30 P.M. Dinner and Speaker*

***Member Cost: \$45.00 dinner (preregister)  
\$50.00 (at the door)***

***Guest Cost: \$50.00 dinner (preregister)  
\$60.00 (at the door)***

Please send your check today!

or

Pay with a credit card online

<https://www.123signup.com/register?id=syjqs>

Questions? Call Krysta at 925.935.9691

***Dinner Menu***

*Lafayette Park Hotel*

***Salad***

Caesar Salad

***Entree***

Flat iron steak, water cress salad, onion jus,  
roasted fingerling potatoes, blue lake green beans

***Dessert***

Chocolate hazelnut mousse cake

*Reservations and cancellations must be received  
by Monday, February 18th by 2:00 p.m.  
to be assured of a reservation.*