

President's Message

Happy belated holidays and a happy new year to all! It's December 30th and I'm thinking that I should hold off sending in this column one more day - perhaps the Senate will vote tomorrow. Or perhaps not. "Fiscal cliff deal remains elusive and the Senate remains deadlock," the news says. The Washington Post says the estate tax is the "latest sticking point". Strange that a tax that supposedly impacts such few numbers of taxpayers presumably has such great importance beyond just our professional world.

A lot of gifting happened in 2012, or at least was talked about. And no matter what the outcome with the current tax negotiations, gift tax returns (Form 709) for those 2012 gifts will be due on April 15, 2013. If you want to be prepared, you need to come to January's dinner because Kyle Martin of the IRS will be talking about gift tax return audits. I think this event will be so popular it may sell out. So don't wait - sign up right away! And make yourself popular by inviting a guest or two - especially someone who in one of our professional categories who might be interested in becoming a member.

I look forward to seeing everyone at the January dinner. (I'll look forward to getting out of my office and communicating other than by phone or email.) And if I don't know you, feel free to introduce yourself to me and any other Board members. Let us know how we're doing, and give us your ideas. Until then, the Board and I wish you all a good and successful 2013!

Paula Leibovitz Goodwin, Esq.,
President 2012-2013

"Recent Changes to the Estate and Gift Tax Law & Tips for Meeting Adequate Disclosure Rules for Filing 2012 Gift Tax Returns"

Join us Wednesday, January 16th to hear Kyle Martin, Supervising Attorney, with the Internal Revenue Service discuss "Recent Changes to the Estate and Gift Tax Law" along with "Tips for Meeting Adequate Disclosure Rules for Filing 2012 Gift Tax Returns".

Kyle is a Supervisory Estate Tax Attorney with the Internal Revenue Service in Oakland, California. He has been with the Service since 1989 and in his current position since March of 2006.

Kyle graduated from the University of Kansas with a Bachelor of Arts degree in Psychology. In 1993, he received his Doctor of Jurisprudence degree from San Francisco Law School. He has been a member of the California State Bar since December of 1993.

As the Supervisory Attorney, Kyle manages 9 Attorneys in San Jose and Oakland, California. Before obtaining his current position, Kyle was an Estate Tax Attorney in San Francisco and Oakland from 1994-2006.

January 16th, 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)***

*Reservations and cancellations must be received
by Monday, January 14th at 2:00 p.m.
to be assured of a reservation.*

Please send your check today!

or

Pay with a credit card online

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