

Hello Fellow Council Member and welcome to Fall, (even though it may not feel like it),

It was great seeing such a large turnout for our last meeting. I hope you found the presentation informative and your time well spent. It nice catching up with some old friends and making some new ones. Please note that our October meeting will be held the fourth Wednesday of the month versus our normal third Wednesday of the month. We are fortunate to have Keith Schiller as our presenter this month. Keith is a local attorney, known on the national speaking circuit. I am sure that his presentation on recent tax developments, including final portability regulations, new and confusing rules directing the disclosure of income tax basis on death, obtaining closing letters, and significant tax court decisions on valuation issues will be very informative. If you have not already done so, please make sure to reserve your spot as soon as possible. Also, remember we love guests, so don't be shy about bringing a friend.

See you soon,

**Darrell Claridge, CFP®**

**President, EPCDV 2015-2016**

**October 28th, 2015**

**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: \$50.00 dinner (preregister) / \$55.00 (at the door)**

**Guest Cost: \$55.00 dinner (preregister) / \$60.00 (at the door)**

*Reservations and cancellations must be received by Monday,*

*October 26 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=pmvmd>

## **“Optimal Use of Recent Developments with Estate Planning”**

Keith Schiller will discuss the important recent tax developments including final portability regulations, new and confusing rules directing the disclosure of income tax basis on death, obtaining closing letters, and significant tax court decisions on valuation issues. These developments create challenges and opportunities for attorneys, accountants, fiduciaries, and other estate planners. Keith will address these, and other recent developments focusing on avoiding pitfalls and optimizing benefits.

### **About the Speaker**

Keith Schiller, Esq., of the Schiller Law Group, a PLC, of Alamo, California, has greater than 40 years of experience with taxation and estate and business succession planning. Keith works with clients and consults with estate planning, trust administration, and tax practitioners throughout California.

Keith is the author of the award-winning reference book, *Art of the Estate Tax Return — Estate Planning At The Movies®*, now in its Second Edition and published by Bloomberg BNA. The book reveals Keith's best practice pointers, his insights from co-teaching with the IRS for 19 years, and practical recommendations from over 25 leading practitioners across the country who contributed to the book. Keith has taught estate tax return and audit practice with IRS estate tax attorneys, group managers, and appeals officers since 1996.

Keith is a member of the Advisory Board for BNA's Gifts and Trusts Journal and the Consulting Board for the Leimberg Information Services, Inc.® Newsletter. He has taught over 15 courses for the CalCPA Education Foundation and received the 2000 and 2010-2011 awards for Outstanding Course Materials.

### **REGISTER NOW!!!**

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

## **Dinner Menu**

### **Salad**

*Waldorf salad - Mixed greens, honey balsamic, Asian pears, blue cheese crumbles, walnuts*

### **Entrée**

*Roasted Pork Tenderloin, Blue Lake Beans, Potato Purée, Mushroom Jus*

### **Vegetarian**

*Market Vegetable Wellington*

### **Dessert**

*House Made Chocolate Tart, Whipped Cream, Raspberries*