

President's Message

The financial markets have gotten off to a rocky start in 2008. Whether one looks to the U.S. or overseas, equity markets across the board are down 10 – 15% from their October 2007 highs. The talk about recession has shifted from whether there will be a recession to how steep such a recession may be (and whether the proposed stimulus package will have an effect).

With a slowing economy, the unwinding of the sub-prime debacle, the continuing decline in the real estate markets, and a still constrained credit market, it seems Chairman Bernanke will have ample opportunity to establish his credentials in the year ahead. Only time will tell how this all plays out but for those who offer financial advice, just remember that “this too shall pass.” Then again, perhaps the current markets are a solution to your client’s “estate tax problem.”

As you’ll see from the program line up listed on this page, we have some interesting speakers and topics planned for the balance of this year. You’ll want to be sure to catch this month’s speaker, Charlie Wolff, who promises to offer both technical insight and a degree of levity to his review of recent litigation (though I am disappointed that we’ll be skipping the Anna Nicole story; oh well ...)

I look forward to seeing you on the 20th.

-Kevin Gahagan

2007 PROBATE AND TRUST LITIGATION YEAR IN REVIEW

Charles Wolff will join us this month to review recent probate and trust litigation. He promises “a case cast of thousands (or maybe ten)”, including:

- The “Burden” of paternity in intestate succession
- The taxability of misappropriated trust assets
- How to turn a contract to make a will into a malpractice action
- Doin’ what comes naturally – objecting to actions by trustees
- Our most durable and prolific performer, the no contest clause
- And nothing whatsoever to do with Anna Nicole Smith.

Wednesday, February 20, 2008

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

*6:00 PM. Wine and Registration
6:30 PM Dinner and Speaker*

***Cost: \$40.00 dinner (if mailed in)
\$45.00 (at the door)***

*Reservations and cancellations must
be received by Monday, Feb 18th, at
1:30 p.m. to be assured of a
reservation. Please send your check in
the enclosed envelope today! or call
Bonni at:*

925.686.4819

Mark Your Calendars!

March 19, 2008

Virginia George
Elder Abuse

April 16, 2008

Adam Alban:
Competency/Mental Capacity

May 21, 2008

Bette Epstein
Planning to Avoid Estate Litigation
from a Litigator's Perspective.

Charles Wolff is a 1977 cum laude graduate of the University of Michigan Law School, having received a B.A. from Wesleyan University in 1974. He has been a business litigator his entire legal career. Since joining Evans, Latham & Campisi in 1985, Charlie has specialized in probate, trust and fiduciary litigation. He is a fellow of the American College of Trust and Estate Counsel. He served on the Executive Committee of the Trusts and Estates Law Section of the State Bar of California from 1999-2005. Charlie was chair of that Section’s Ethics Committee and also of the Litigation Subcommittee of the Probate and Trust Section of the Bar Association of San Francisco.

A frequent speaker throughout the state, Charlie is also an author. He co-wrote “The Dead Hand Writes – And, Having Writ, Moves On: Drafting and Litigating No Contest Clauses”. He is also one of the authors of *California Trust and Probate Litigation*, published by Continuing Education of the Bar (CEB), California.