

President's Message

While the democratic primary may be garnering all of the media attention, our estate planning council is engaged in an election of its own. Yes, it's time for the annual election of our board of directors and officers for the upcoming 2008 – 2009 program year. Officially ...

Members are given notice that our annual meeting will be held at 6 PM on Wednesday May 21, 2008. All active members will be entitled to vote on the Council officers and Board of Directors for the 2008 – 2009 year.

Despite rumors of a possible rump slate of candidates led by Council renegades, no such action was forthcoming. Accordingly, the nominees for the 2008 – 2009 board are:

Officers:

Lynn Gardner, President
Rob Silverman, Vice President
Valerie Neale, Secretary
Bruce Coblenz, Treasurer
Kevin Gahagan, Chairman

Directors:

Terry Allen
Elisabeth Andreason
Glenn Angers
Carla Bryant
Paula Leibovitz
Carol O'Neill

Please be sure to join us and exercise your voting rights under the By-Laws of the Council. Vote early and vote often.

Kevin Gahagan

PLANNING TO AVOID ESTATE LITIGATION FROM A LITIGATOR'S PERSPECTIVE

Bette Epstein will discuss, from her perspective as a trust and estate litigator and former psychotherapist, some of the issues that arise in the context of estate planning and administration. These issues should raise red flags for both the planner and the family members regarding the choice of fiduciaries, the future use of special assets such as the family vacation home or ranch, management of the family business and relationship of family members after the parents die.

Bette has a B.S. from USC, an M.S. in Counseling from California State University, Hayward and a Certificate in Gerontological Studies from UC Berkeley. She received her J.D., magna cum laude, from the University of San Francisco and was awarded the American Jurisprudence Award in community property. She began her association with Crosby, Heafey, Roach & May in 1986 where she was head of the Trust and Estate Practice Group, member of the Executive Committee. In 2003, the firm merged with Reed Smith and Bette became Managing Partner of the Oakland office in 2007

Wednesday, May 21, 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, May 19th 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

Bette's professional affiliations include the Estate Planning, Trust & Probate sections of the State Bar of California, and the Alameda and San Francisco County Bar Associations. She has served as chair of the Litigation Section of the Alameda County Bar Probate Section and as a volunteer for the Alameda County Bar Association Volunteer Legal Services. Bette is also affiliated with the American College of Trusts & Estates Counsel. She currently serves on the Samuel Merritt College Board of Regents and the mediation panels for the San Francisco and Alameda Probate Courts and the California Appeals Court First District.

Bette has been a licensed Marriage and Family Therapist since 1983. She finds that she has frequently called upon her counseling background in her representation of her clients — particularly where family members are in dispute.

Mark Your Calendars!

June 18, 2008

A Field Trip!

**Bonhams and Butterfields
Estate Auction House**