

President's Message

The members of the **Tri-Valley and East Bay Estate Planning Councils** have been invited to join us for this month's meeting. We have been looking forward to hearing from tax guru, Dean Zerbe.

Our year is drawing to a close and it is time to consider nominations for the Board of Directors. There are two positions open. Board terms are normally two years. Besides me, the following individuals are serving on the nominations committee:

Kevin Gahagan	415-788-1952
Rob Silverman	925-944-9700
Joseph Curtis	925-938-3399
Mary Kay Foss	925-838-9640

The committee has until April 12th to file the names of their nominees with the Secretary.

The bylaws provide that any five active members may nominate candidates by written notice to the Secretary. The notice is due before May 1st. Given Bonni's deadline for printing the May newsletter, it would be helpful to have such notice by April 20th so the list of candidates can be included. The election will be held at the start of our May 20th meeting.

The Board has decided on an activity for the June meeting. We will attend a performance of "Cabaret" at Diablo Center Rep in Walnut Creek. Prior to the performance, there will be a wine and dessert reception at Massimo's. Mark your calendars for June 17th.

Be sure to welcome the Tri-Valley and East Bay members as well as our own CPAs who have been in hibernation since January.

- Lynn Gardner

Washington and Tax Policy: The Good, the Bad and the Ugly. *What will happen, why it will happen and what you need to be doing now to help your clients?*

Virtually all of our speakers, are locally known experts in some aspect of estate planning. We have a special treat for April – a prominent national expert in taxation. **Dean Zerbe**, National Managing Director of alliantgroup, is based in Washington D.C. When searching for a Washington "insider" who could present to our group, we were lucky enough to hit a grand slam! It's hard to imagine a more qualified candidate than Mr. Zerbe to give us a truly "inside view" on past and current federal tax legislation, as well as commentary on anticipated legislation and trends. Of course, his talk will include (but won't be limited to) relevant discussion about estate and gift tax.

alliantgroup describes itself as a "premier high-value specialty tax services provider to CPA firms and their clients". This national advisory firm serves "a broad spectrum of clients, from individuals and start-ups to large industrial, service, and financial corporations". The mission of Mr. Zerbe and alliantgroup's team of Directors is to provide "sound, informed advice that contributes to the growth and long-term stability of our clients' business." alliant-group's Directors consist of former Big 4 accounting firm partners, law firm partners, engineers, scientists, and software developers.

Prior to coming to alliantgroup in February, 2008, Mr. Zerbe was in the national spotlight as Senior Counsel and Tax Counsel to the U.S. Senate

Committee on Finance. From 2001 through 2007, he worked closely with the then Chairman (and currently Ranking Member) of the Finance Committee, Senator Charles Grassley (R-IA), on tax legislation. In this capacity, Mr. Zerbe was intimately involved with almost every major piece of tax legislation that was signed into law, including the 2001 and 2003 tax reconciliation bills; the JOBS bill in 2004; and the Pension Protection Act.

Mr. Zerbe's academic credentials are as interesting and impressive as his professional experience. He received both a B.F.A. in Film Production and an LLM in Taxation from New York University (NYU), and his J.D. from George Mason University (high honors).

Wednesday, April 22, 2009

*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, Apr 20th at
1:30 p.m. to be assured of a
reservation. Please send your check in
the enclosed envelope today! or
Pay online!*

www.acteva.com/go/epcdv

call Bonni at:

925.686.4819