

We at the Estate Planning Council of Diablo Valley are looking forward to our upcoming joint meeting on April 17. Our speaker is Mark Weaver of Farella, Braun & Martel. He is a tax expert who is both very engaging and informative. His presentation at our Council several years back, comparing the various proposed changes to the tax laws (yes, that was before the Tax Cuts and Jobs Act) was fascinating and a big hit with our members. I'm sure he'll be equally impressive this time.

This meeting is also special because it gives us an opportunity to socialize with all of our friends (and future friends) who are members of our fellow Councils all over the Bay Area! Our venue is beautiful, the food is great and the company will be inspiring. Please be sure to join us!

Kirsten Howe

2018-2019 EPC Diablo Valley President
Estate Planning Council of Diablo Valley

“Planning Until Sunset: Gift, Estate, GST and Income Tax Planning Strategies Following the 2017 Tax Act”

Presented by: **Mark T. Weaver, Esq., Partner**
Farella Braun + Martel LLP, San Francisco

Mr. Weaver will discuss strategies to optimize revocable and irrevocable trusts in light of the changes to the federal gift and estate tax regime as a result of the passage of the 2017 Tax Act. With transfer tax exemptions larger than ever, it is becoming critical to engage in planning to achieve a step-up in basis for income tax purposes, while continuing to plan for a reduction in exemption amounts when the law sunsets, as well as the lack of GST-portability. He will also review recent proposals by presidential candidates that would impose a wealth tax, increase the estate tax, and reduce the estate tax exemption.

About the Speaker:

Mark Weaver is a partner in Farella Braun + Martel's Private Client group. Mr. Weaver assists high-net worth individuals and families with their estate and business succession planning. He regularly leverages sophisticated wealth preservation techniques, including the formation and administration of irrevocable trusts, business entities, sole purpose entities and charitable vehicles, to implement his clients' objectives. A key aspect of Mr. Weaver's practice is counseling clients on cross-border issues, including those with beneficiaries and/or assets that are located in multiple countries, as well as those planning to enter or leave the United States. He is the current Chair of the San Francisco Branch of the Society of Trust and Estate Practitioners (STEP), a member of the Planned Giving Committee of the Regional Parks Foundation, and a regular speaker on techniques to protect familial assets, including advanced wealth transfer programs and international estate planning.

April 17, 2019

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

Guest Cost: \$60.00 dinner (preregister) / \$65.00 (at the door)

Please note all reservations and cancellations MUST be made no later than 2pm the Monday before the monthly meeting. If reservations are received after the Monday before the meeting, the cost will be considered at the door. Refunds will not be granted to cancellations that are received after Monday at 2pm. All cancellation requests and at the door registrations need to be made in writing to

EPCDiabloValley@gmail.com

Please send your check today! or Pay with a credit card online

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

Dinner Menu

Salad

Baby Spinach Salad; Strawberries, Oven-Dried Pear, Shaved Red Onion, Champagne Pear Vinaigrette

Entrée

Grilled Chicken Breast; Sun-Dried Tomato, Basil and Pine Nut Vinaigrette

Vegetarian

Wild Mushroom Strudel; Sautéed Wild Mushrooms in Puff Pastry

Dessert

Chocolate Truffle Mousse, Hazelnut and Dark Chocolate, Vanilla Whipped Cream