

The board of directors of the Estate Planning Council of Diablo Valley and I wish all of you a lovely spring, as our thoughts turn to new beginnings from planting our gardens to planning our futures.

We got a sad reminder of the importance of planning well from the unexpected death last month of actor Phillip Seymour Hoffman. By not planning carefully for his \$35 million estate, Hoffman, who won an Oscar for starring in *Capote*, may have saddled his partner Marianne O'Donnell with a whopping multimillion-dollar tax bill. Had he been married to O'Donnell or had a well-crafted estate plan it would have reduced the tax burden, but he left his estate outright to his partner O'Donnell in his will. In addition, Hoffman's outdated 2004 plan provided for their first son, but not the two daughters that followed, setting the stage for a tangle of legal action.

That's the kind of family-shredding scenario that last month's EPCDV speaker, nationally known attorney Justin Miller, works to prevent, and his presentation "Secrets of Successful Families: Transferring Values with Wealth for a Lasting Legacy" was well received. Hoffman did take one approach Miller would approve of—he was creative about making his will reflect his personal values. The actor included a request that his son be raised in Manhattan, Chicago, or San Francisco so he'd be exposed to the culture and arts in those cities.

We're looking forward to this month's meeting when Sara Stephens, RN, will talk about "The Importance of Clinically Focused Advance Directives." At the meeting, we'll be continuing our successful policy of ending our presentations close to 8:00 p.m. for the benefit of members who need to get home at a reasonable hour. As always, audience members who want to continue the conversation after that time will be warmly invited to come up and talk with the speaker in person.

See you Wednesday, March 19!

-Terry Allen, CFP®, AWMASM, President 2013-2014

March 19th, 2014

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: \$45.00 dinner (preregister) / \$50.00 (at the door)

Guest Cost: \$50.00 dinner (preregister) / \$60.00 (at the door)

Reservations and cancellations must be received by Monday, March 17 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=dydrc>

"The Importance of Clinically Focused Advance Directives"

Sara will discuss in her presentation:

- The burden and benefits of today's health care model and advancements in medicine
- Insight into current challenges faced by patients and families in hospitals today
- The importance of and the role of the Durable Power of Attorney for Health Care
- The need for a clinically focused Advance Directive
- Suggestions for attorneys in the process of developing Advance Directives.

Sara Stephens, RN, holds a Bachelors of Nursing from Stanford University. She is a partner and Director of Clinical Car at Good Medicine, which is the first clinical practice in the country to focus primarily on health care planning. Good Medicine has been featured in the San Francisco Chronicle and New York Times for its revolutionary work in the realm of Advance Directives and Patient Advocacy. Sara has spent the last 4 years developing the Good Medicine program of Advance Care Planning and completing Advance Care Plan's for patients both locally and nationally.

Sara's clinical experience includes work at local hospitals in medical surgical nursing, intensive care units, and transitional care units and in pre-operative nursing facilitation. She has served as nursing liaison between the board of managers and the health care center at The Heritage, and currently serves on the Board of Directors for San Francisco's Laguna Honda Hospital Volunteers, Inc., a non-profit organization that works to improve the quality of life for patients and to recruit and support hospital volunteers.

REGISTER NOW!!!

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

Dinner Menu

Salad

Spinach Salad, Pickled Red Onions, Sage Derby Cheese, Mustard Vinaigrette

Entrée

Braised Beef Short Ribs, Red Cabbage With Apples, Herbed Spaetzle, Natural Jus

Dessert

Milk Chocolate Mousse, Meringue and Hazelnut Cake