

President's Message

Our April meeting was a rousing success, thanks to Rob Silverman. The scheduled speaker, Dean Zerbe, had to cancel on short notice and Rob found a great replacement. Fran Dubreil, National Managing Director for Bernstein Wealth Management, spoke about adapting investment strategies to a market full of turmoil.

Kevin Gahagan assisted Rob with May's speaker: Myron Greenberg. I have heard Myron on several occasions and really look forward to his presentation on advanced estate planning techniques.

We will begin our meeting with the election of officers and directors for 2009-2010.

The nominees are:

Rob Silverman, President
Valerie Neale, Vice President
Carol O'Neill, Secretary
Bruce Coblenz, Treasurer
Terry Allen, Membership
Elisabeth Andreason, Director
Carla Bryant, Director
Paula Leibovitz, Director
G. Scott Hayden, Director
Geoffrey Zimmerman, Director
Lynn Gardner, Chairperson

Our June 17th social meeting is a performance of Cabaret at Center Rep in Walnut Creek. We will begin with a wine and dessert reception at Massimo's. Hope you can join us!
- Lynn Gardner

* **Member Social** *

June 17th
"Cabaret"

\$55 per person

Includes wine, dessert and ticket
Call for reservations today! 686-4819

"Acronym Soup:

The Features and Benefits of GRATs, IDGTs and OPRTs"

It is fitting that the topic of our May meeting – our final educational program for the 2009 fiscal year (June is a social program) – is the most "advanced". **Myron Greenberg, Esq.**, an attorney in Marin County who has been practicing law for over 35 years, and who's also a CPA, will present "Acronym Soup - The Features and Benefits of GRATs; IDGTs and QPRTs". Mr. Greenberg will give us valuable background about the genesis of these sophisticated estate tax mitigation strategies, income and estate tax rules governing them, and how and when to create these various types of irrevocable trusts.

Mr. Greenberg opened his own law offices in Larkspur in 1982, and before that he was a partner at several prominent S.F. law firms. He has specialized in taxation, estate planning and related matters, and is a Certified Specialist in Taxation Law (State Bar of California Board of Legal Specialization).

In addition to managing his law practice, he is a frequent speaker and workshop leader on topics related to estate planning and taxation. From 1989 to 2003, he served as an instructor for the University of California Berkeley Extension, teaching a class on estate planning; and he was a lecturer on taxation matters for Golden Gate University, School of Tax.

Mr. Greenberg earned his law degree in 1970 from the University of Calif., Los Angeles, School of Law. Following graduation from law school, he became a Certified Public Accountant and worked for one year as a staff accountant with Touche Ross & Company. He received his Bachelor of Science degree in business administration from UCLA in 1967.

Mr. Greenberg has numerous other honors and credentials, including serving as Chair of the California Board of Legal Specialization of the Taxation Commission of the State Bar of California, and Past President of the Marin County Bar Association. He is also a member of the Marin County Estate Planning Council, where he served as president in 2004.

Visit us online – www.epcdv.org

Wednesday, May 20, 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,
May 18th at 1:30 p.m. to be assured
of a reservation. Please send your
check in the enclosed envelope
today!*

or

Pay online (for a nominal fee)!

www.acteva.com/go/epcdv

or call Bonni at:

925.686.4819