

President's Message

If you were fortunate enough to get into the April meeting, I heard you witnessed a great presentation to a sell-out crowd. One point to note - Catherine Hughes strongly recommended you contact Treasury with comments about Proposed Regulations, Notices, etc. After the meeting, she clarified that comments should be directed to the contact person referenced at the end of the regulation or notice, not to Mrs. Hughes.

Our May meeting marks the last technical dinner meeting of the year. On June 20, we will meet at the Lafayette Library and Learning Center for our June social. Wineries from the Lamorinda area will be presenting local wines and there will be a presentation about growing and making wine in our own back yard. The venue is really nice and just recently constructed within the last few years. It should be a nice event.

This is our Annual Meeting where we will present the slate of officers for next year. The Nominating Committee met earlier this month and decided on the slate of officers being proposed. We will ask for a vote on the total slate.

*Bruce H. Coblentz, CPA (retired)
President 2011-2012*

“Estate Planning for Virtual and Online Assets”

Are you planning for what happens with digital or virtual assets and other online information when your client dies or becomes incapacitated? A fiduciary is charged to take possession of the assets of an estate or protected person, and must have access to all information to function properly. In the context of virtual assets, how can a fiduciary carry out his or her responsibilities? Ambiguity in the law may create unintended criminal and civil consequences when an authorized fiduciary seeks to access, control, or transfer digital assets or accounts.

Please join us on May 16th, to hear attorneys **Michael Walker and Victoria Blachly**, speak on this subject from their respective positions as an estate planner and litigator. The presenters are in the midst of working on legislation in Oregon, and have helpful information and an interesting perspective to share.

May 16, 2012

*Lafayette Park Hotel
3287 Mt. Diablo Blvd.
Lafayette*

*6:00 P.M. Wine and Registration
6:30 P.M. Dinner and Speaker*

**Cost: \$40.00 dinner (preregister)
\$45.00 (at the door)**

*Reservations and cancellations must
be received by Monday,
May 14th at 1:30 p.m. to be assured of
a reservation.*

Please send your check today!

or

Pay with a credit card online

<http://www.123signup.com/calendar?Org=epcdv>

or

*call Bonni at:
925.686.4819*

Michael D. Walker and Victoria Blachly are attorneys in the Portland, Oregon law firm of Samuels Yoelin Kantor LLP. Michael is a business, tax and estate planning attorney who has worked with individuals and small to medium-sized businesses for more than 20 years. Michael graduated with high honors from Northwestern School of Law of Lewis and Clark College, and is licensed to practice law in both Oregon and Washington. He has authored numerous articles and is a frequent speaker.

Victoria's practice is almost entirely focused on trust and estate litigation, with a focus on fiduciary litigation for trustees, beneficiaries, and personal representatives. She writes and lectures at both the national and state level. Victoria is also a graduate of the Northwestern School of Law of Lewis and Clark College.

**Mark Your Calendars! Annual Social Event - Wine and Hors d'oeuvres
June 20, 2012 at the New Lafayette Library**

A chance to learn about and taste some local wines – and we don't mean Napa! Local Lamorinda Wineries will be coming to us and telling us about their wines.