

President's Message

We live in interesting times. As a state and a nation, we are addressing many challenging issues. While our local, state and federal governments deal with large deficits and competing priorities, and debate fundamentally important matters such as health care, we all fight our own battles trying to balance work, family and personal needs.

One highly charged issue with important legal, economic, tax and social implications is same sex marriage. At the forefront of this debate in California is the passage of, and legal challenges to, Proposition 8. Regardless of our personal opinions about decisions made on the state and federal level, it behooves all of us to become better educated about this arena.

Ms. Kinney, our October speaker, will help us better understand the complex matrix of matters surrounding this fascinating subject. Ms. Kinney's presentation should help our members better understand the status and estate planning implications of Proposition 8, and how Proposition 8 relates to California's current registered domestic partnership law.

Finally, for your procrastinating clients or those who have important planning needs about which they should consult with you, perhaps you can prompt them into action by informing them that the NAEPC Foundation, in conjunction with the National Association of Estate Planners & Councils, have declared Oct. 19th – 25th “National Estate Planning Awareness Week”!

Enjoy the early autumn...

- Rob Silverman

“THE PLANNING ENVIRONMENT - POST PROP 8”

Planning for same-sex couples has become increasingly complex since the passage of Proposition 8 last November. Since 2005, Registered Domestic Partners have had all the same rights and responsibilities of spouses but are treated differently by the federal government, creating tax and estate planning challenges for practitioners. In this session, we are pleased to have **Deb Kinney** reviewing the laws as they pertain to Registered Domestic Partners, same-sex married couples before and after Prop. 8. She will give us an update on legal challenges throughout the country that may affect couples living in California.

Deb is an attorney with an estate planning, trust administration and probate practice with offices in San Francisco and Santa Rosa. Her client base is comprised of a broad spectrum of families, but Deb is most known as a resource for emerging issues pertaining to the Domestic Partner Rights and Responsibilities Act, commonly known as AB205, and also for issues pertaining to marriage for same-sex couples. Deb has been involved with the passage of SB 565 making property tax reassessment exemptions retroactive to the date of registration for domestic partners and is involved with another real property tax bill in the California Legislature this year.

**Wednesday
October 21, 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,
October 19th 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*

Mark Your Calendars!

November 18, 2009

John Wiley

Franklin Templeton

“CA Economy & Muni Bonds”

Deb serves on the board of *Horizons Foundation* and is co-chair of the Planned Giving Committee. She is also Vice-President of the board of *Equality California*, a statewide legislative organization dedicated to equality for the LGBT community. She is a member of the California State Bar Trusts and Estates Section, and the Bar Association of San Francisco.

Join us and learn!