

President's Message

Our first meeting last month was attended by more than any meeting in recent history, if not since we were first chartered. John Hartog, Esq., Mary Kay Foss, CPA, and Carol O'Neill, Esq. all contributed to an excellent presentation. I thank the panel and all of you who attended for your support. Those of you arriving at the last minute found no available seats due to an early start and many attendees not signing up in advance. Those sitting in the back of the room were served very late, somewhat due to logistics with the hotel under a new Banquet Director. Bonni has dealt with this problem and we should be better going forward. It would help a lot having our members and guests sign up before the deadline to avoid some of these problems in the future.

Dues reminder notices were sent out by email to those not having paid by last week. Please get your dues paid so we can include you in the directory.

Look at your contact list to see if there are potential members, and invite them as a guest for one of our upcoming programs. We are looking forward to a very good year. See you on October 19.

-Bruce H. Coblentz, CPA

**Proposed By Law Changes
will be voted on at THIS
Meeting –
To view the proposed by-laws
please click [HERE](#)
Or go to the Membership
page on the website
www.epcdv.org**

“Trustees: Safely Paying Yourself and Your Attorneys”

In October we will have Oakland attorneys, **Margaret M. Hand, Esq.** and **David D. Little, Esq.** speak on a topic important to many of us: trustee and attorney fees. Margaret M. Hand, author of the chapter on attorney fees in the new Matthew Bender book, “Trust Litigation,” will talk about attorney fees in trust administrations, particularly acrimonious trust administrations. Experienced attorneys instinctively avoid the court’s scrutiny of their fees. Margaret will tell us how to survive scrutiny when it cannot be avoided. She will also suggest ways in which attorneys can keep their clients happy, even in the face of big attorney-fee bills.

David D. Little is the author of another chapter in the new Matthew Bender book on trustee compensation. He will discuss the determination of “reasonable” compensation under the trust instrument, trustee compensation for greater or less amounts than specified in the trust instrument, dual compensation of attorneys and other professionals acting as trustees, and all things related to making or opposing trustee compensation claims, including whether to seek or oppose court approval of trustee compensation.

Margaret Hand and David Little represent professional and non-professional fiduciaries in acrimonious and harmonious estate administrations. They also represent parties in estate-related litigation, such as will contests, and in actions against fiduciaries for breach of fiduciary duty. Margaret is a fellow

of the American College of Trust and Estate Counsel (ACTEC) and a certified specialist in Estate Planning, Trust and Probate Law. Along with her chapter in the new Matthew Bender book, she is the author of several chapters in various practice guides published by the Continuing Education of the Bar. She teaches fiduciary accounting through the CalCPA Foundation and serves as a special master in fiduciary accounting cases. She also is an experienced mediator.

David is an attorney with the Law Offices of Margaret M. Hand, PC. He is currently the Vice President and Program Chair of the East Bay Estate Planning Council. David speaks frequently on the topic of trustee compensation, trust and estate litigation, and estate planning throughout the Bay Area.

October 19, 2011

*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,
Oct 17th 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*