

*We at EPCDV* hope you are having a beautiful autumn. As this year begins, we can see the estate planning landscape is changing by the day, and at EPCDV it's our mission to help you learn about new developments in the field as they arise. In September, attorney Susan von Herrmann's talk about the impact of the Supreme Court's Defense of Marriage Act (DOMA) ruling on estate planning was well received. At the upcoming meeting on October 16, William P. Fuller, will discuss the important developments in advanced estate planning in his presentation, "Advanced Estate Planning in a Volatile Environment: Issues and Options."

Also, we want to remind you to renew your membership if you haven't already done so. To be included in the directory, your membership must be renewed by October 15.

Please click [www.123signup.com/renew?Org=epcdv](http://www.123signup.com/renew?Org=epcdv) to renew.

This year for the first time, members are being offered the opportunity to place an advertisement in our EPCDV membership directory. To have your ad included in the directory you must have a current membership. Full- and half-page ads will be available, as well as space on the directory's inside and back covers, at the following rates:

<b>Inside front cover:</b>	<b>\$750</b>
<b>Back cover:</b>	<b>\$500</b>
<b>Inside back cover:</b>	<b>\$250</b>
<b>Full page:</b>	<b>\$150</b>
<b>Half page:</b>	<b>\$ 75</b>

To purchase an ad, please click the link

<https://www.123signup.com/event?id=dxzmq> or contact Krysta Patterson at [EPCDiabloValley@gmail.com](mailto:EPCDiabloValley@gmail.com) or (925) 935-9691.

At this year's meetings, we want to make sure we have plenty of time for our speakers' presentations and follow-up questions, while still being able to conclude the evening before 8:15. To that end, we'll be asking our members and guests to be settled in at the dinner table by 6:30 so speakers can start their presentations right at 7:00.

Hope you enjoy the presentation on the October 16!

*-Terry Allen, CFP®, AWMA<sup>SM</sup>, President 2013-2014*

### October 16th, 2013

*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, October 14 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/event?id=dfmsz>

## *"Advanced Estate Planning in a Volatile Environment: Issues and Options"*

Join us October 16th to hear William discuss the political and economic landscape and the potential impact on advanced strategies involving valuation discounts, grantor trusts, and other advanced estate planning techniques. The program will also include a review of current advanced planning techniques, including Defective Grantor Trusts, Family Limited Partnerships, GRATs and other strategies, and how the estate planning landscape might change in an environment with higher income taxes and more restrictive rules.

**William P. Fuller** is a Partner with Hanson Bridgett. Will practices in the area of estate planning, trust and probate administration and planned charitable giving. Prior to joining Hanson Bridgett LLP, Will was the head of the estate planning and administration group at the Howard Rice firm (now Arnold & Porter).

**REGISTER NOW!!!**

<https://www.123signup.com/event?id=dfmsz>

### *Dinner Menu*

#### **Salad**

*Waldorf Salad (Mixed greens, honey balsamic, Asian pears, blue cheese crumbles, walnuts)*

#### **Entrée**

*Roasted pork tenderloin, blue lake beans, potato purée, mushroom Jus*

#### **Dessert**

*House made chocolate tart, whipped cream, raspberries*