

Greetings! After our summer break, it was enjoyable getting back together again starting with our September meeting, talking with old friends and colleagues, and particularly nice to see a number of guests joining us. I hope to see this trend continue throughout the year as we encourage the return of our current members and seek to expand our council with the practitioners in our communities who are among the best in their respective professions.

With the arrival of Autumn (at least, according to the calendar) I've started to see roadside pumpkin patches, corn mazes, and other signs that Halloween is in sight. Halloween causes me to think about the tricks or treats that might lie hidden in our clients' estate plans, and what nightmares might arise from the grave. These themes make for good stories as we hold our flashlights under our chin and tell tales around the campfire about ghosts coming back to haunt their descendants.

Thinking about descendants caused me to wonder: What is considered a descendant? A quick google search suggests that a lineal descendant refers to a blood relative in the direct line of descent – e.g., the children, grandchildren, great grandchildren, etc. of a person. A number of estate plans that I've had the opportunity to review contain language that define "issue" as the lineal descendants of all degrees or generations. Does this go

far enough? In practical terms, what are the financial, legal, and moral implications for a society that has become so technologically advanced that a child - presumably a lineal descendant - can be created by virtue of frozen gametes or embryos?

As technology and society advance into the future, governance and law must adapt, albeit sometimes painfully, and in fits and starts. Accordingly, estate planning – along with other forms of financial planning – is an evolutionary process, revisited periodically to remain current and relevant. Our October program, "The New Biology: What Estate Planners Need to Know About Assisted Reproduction" will likely provoke some "spirited" discussion, and hopefully help our clients avoid a "ghoulish" outcome.

We look forward to seeing you on October 15<sup>th</sup>.

- Geoff

**Geoffrey M. Zimmerman, CFP®  
President, EPCDV 2014-2015**

## "The New Biology: What Do Estate Planners Need to Know About Assisted Reproduction"

The name of their presentation is "The New Biology: What do Estate Planners Need to Know About Assisted Reproduction". From assisted reproductive technologies, posthumously conceived children, dispositional control of reproductive material, to use of surrogates and donors, Lisa and David will walk us through a fascinating litany of issues that arise when assisting clients with families created through The New Biology.

### About the Speakers

We are pleased to have presenting to us this month, two very fine professors of Law from UC Davis, School of Law. **David Horton** joined the UC Davis faculty in 2012, after three years at Loyola Law School, Los Angeles. He received his B.A. cum laude from Carleton College in 1997 and his J.D. from UCLA School of Law in 2004. David's research focuses on wills and trusts, federal arbitration law, and contracts.

**Lisa C. Ikemoto** teaches bioethics, health care law, public health law, reproductive rights, law & policy, and marital property. Her research areas include reproductive and genetic technology uses, health care disparities, and public health law. Professor Ikemoto is a Bioethics Associate of the U.C. Davis Health System Bioethics Program and a Faculty Associate of the U.C. Davis Center for Science and Innovation Studies. Professor Ikemoto received her B.A. in English and History from UCLA in 1984, her J.D. from UC Davis, School of Law in 1987 and her LL.M. from Columbia University, School of Law in 1989.

### **REGISTER NOW!!!**

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## *Dinner Menu*

### **Salad**

*Mix Greens, Honey Balsamic, Asian Pears,  
Blue Cheese Crumbles, Walnuts*

### **Entrée**

*Roasted Pork Tenderloin,  
Blue Lake Beans, Potato Purée, Mushroom Jus*

### **Vegetarian**

*Market Vegetable Wellington*

### **Dessert**

*House Made Chocolate Tart, Whipped Cream,  
Raspberries*

**October 15th, 2014**

**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: \$50.00 dinner (preregister) / \$55.00 (at the door)**

**Guest Cost: \$55.00 dinner (preregister) / \$60.00 (at the door)**

*Reservations and cancellations must be received by Monday,  
October 13 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/register?id=vjyxx>