



The East Bay Chapter of the California Society of CPAs, Mechanics Bank
and The East Bay Community Foundation invite you to attend:

The 14th Annual ADVANCED ESTATE PLANNING SYMPOSIUM

Moderator: Anna Maria Galdieri, CPA, East Bay Chapter, California Society of CPAs

Topics and Speakers:

- 1:00–2:00 p.m.** **“Property Tax Planning”**
James Bone, CPA, California Property Taxes, Sierra Madre, CA
- 2:00–3:00 p.m.** **“The Current State of Discount Valuations”**
Carsten Hoffmann, ASA, FMV Opinions, Inc.
- 3:00–3:15 p.m.** **Break**
- 3:15–4:15 p.m.** **“Estate Planning At The Movies™-- Do You Remember When?”**
Keith Schiller, Attorney At Law, Orinda, CA
- 4:15–5:15 p.m.** **“Roth IRA Conversion: Is this the time?”**
Mary Kay Foss, CPA, Greenstein, Rogoff, Olsen & Co. LLP, Danville, CA

Objectives: Update estate, gift and trust tax issues for professionals working in these areas. **Designed for** CPAs, attorneys, trust officers and financial planners who work in the estate planning arena. **Prerequisite:** A basic understanding of estate, and gift taxes and income taxation of trusts.

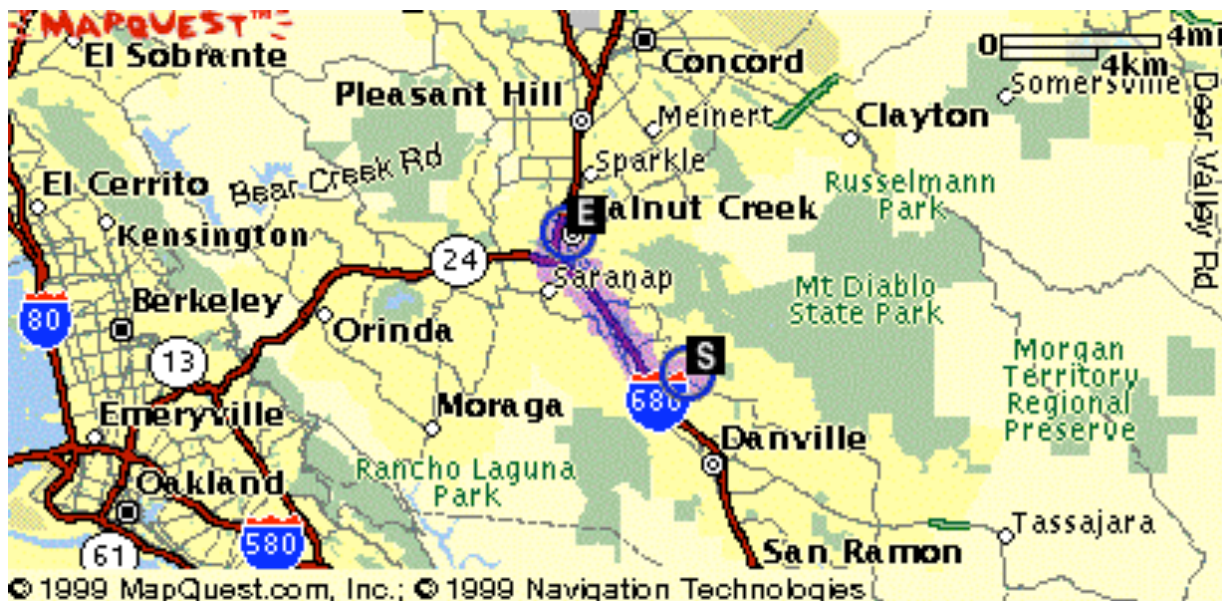
DATE:	Tuesday, Nov. 3	TIME: 12:30 p.m. Registration
PLACE:	Round Hill Country Club 3169 Round Hill Rd., Alamo CA (925) 831-3046	1–5:15 p.m. Afternoon Program 5:15–6:30 p.m. Reception
COST:	\$95; add \$10 after Oct. 29	CPE: 4.5 Hours MCLE: 4 Hours LS-EP: 4 Hours CFP-EP: 4.5 Hours

Register online at www.calcpa.org/EB. Mail your check payable to CalCPA to:
California Society of CPAs; 1235 Radio Rd; Redwood City, CA, 94065-1412; Attn: Soco Davenport.
Phone (925) 926-0189 Fax (650) 802-2665
Admission on the day of the event only if space permits.

Advanced Estate Planning Symposium—Tuesday, Nov. 3

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Amount Enclosed \$ _____
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FROM 680 NORTH AND 680 SOUTH:

Take Stone Valley Road East, continue East for approximately one mile, turn Left onto Round Hill Road and continue straight. Round Hill Country Club entrance on right.

FROM HWY 24:

Merge onto CA-24 E. Take I-680 South Ramp towards San Jose. Merge onto I-680 South Ramp. Merge onto I-680 S. Once on 680 follow directions for 680 North and South.