

CalCPA Los Angeles Chapter Estate Planning Committee
2009 Meetings | www.calcpa.org/LA/estate

Feb. 11 Nelson Handy	13th Annual IRS Meeting Kym Taborn, Esq. and Ann C. Harper, Esq.
March–April	Dark (Tax Season)
May 13 Tim Anderson	Fiduciary Investment Issues in Light of Madoff Russ Hill
June 10 Ralph Bovitz	When A Troublesome Beneficiary Goes Bad Stephanie Zaffos, Esq.
July 8 Ashley Risner	Managing and Avoiding Conflict in Estates & Trusts Paul Fisher
Aug. 12 Richard Gilbert	California Law Issues in Estate Planning (Property Character, No Contest Provisions, Income Taxes, etc.) Jim Birnberg, Esq.
Sept. 16 (Note date change) (Joint meeting with Tax Committee) Bob Birgen	Estate Planning/Income Tax Issues for Non-Traditional Couples
Oct. 21 (Note date change) (Joint meeting with Tax Committee) Dan Delaney	Estate Planning in a Low Interest Rate Environment (GRATS, Installment Sales, Loans) Jonathan Lurie, Esq.
Nov. 11 Andrew Welzel	Estate Planning 101 (A Beginner's Guide with something for the Advanced as Well) Jennifer Honey, Esq. and Maureen Cronin, CPA
Dec. 9 Tim Anderson	Year-End Estate & Gift Update: New Cases, Rulings & Legislation Andy Katzenstein, Esq.