

**L. A. CHAPTER OF THE CALIFORNIA SOCIETY OF C.P.A.s  
ESTATE PLANNING COMMITTEE**

CALENDAR of MEETINGS

**Updated 7/12/2010**

January 13, 2010 Andrew Welzel	<b>DAVID SHERAK, ESQ. &amp; CARSTEN HOFFMAN</b> - Transferring Wealth Without Gift Tax (Discounts, Etc.)
February 10, 2010 Nelson Handy	<b>I.R.S. MEETING –MICHAEL ZAREFSKY, ESQ. &amp; MICHAEL PERLMUTTER, CPA ESQ.</b> - 14 <sup>th</sup> Annual I.R.S. Meeting
March & April 2010	<b><u>(no meetings- tax season)</u></b>
May 12, 2010 Tim Anderson	<b>ASHLEY RISNER, ESQ. &amp; JOHN JACOBSON, ESQ.</b> - Funding Stale Trusts; How Many Years Can I Wait?
June 9, 2010 Bob Birgen	<b>NELSON HANDY, ESQ. &amp; MITCH FREEDMAN, CPA</b> - Estate Planning for Non-Taxable Estates- Why Bother?
July 14, 2010 Richard Gilbert	<b>STEVE LOWE, ESQ. &amp; JUDGE ED ROSS</b> - CPA as Trustee- Should You?
August 11, 2010 Geoff Bremer	<b>ANDREA ROSS, ESQ</b> - Estate Planning With Atypical Spouses (Non resident, Non citizen, Multiple Exes, Pre & Post Nups, etc.)
September 22, 2010 (NOTE DATE CHANGE) (Joint meeting with Tax Committee) Tim Anderson	<b>BILL DOWNS, CPA &amp; KEN FEINFIELD</b> - Income Tax Planning & Issues for Fiduciaries (Fed & Ca), Including Why You Need to Keep Your Trusts Out of California
October 20, 2010 (NOTE DATE CHANGE) (Joint meeting with Tax Committee) Geoff Bremer	<b>BILL WEINTRAUB, ESQ &amp; KIP DELLINGER, CPA</b> - FLP Planning In Light of IRS Challenges- Update and Opportunities
November 10, 2010 (Joint meeting with LA CPA Attorneys) John Jacobson	<b>BILL STALEY, ESQ.-</b> A Business Attorney's View of Issues That Estate Planners Should Spot
December 8, 2010 Bob Birgen	<b>ANDY KATZENSTEIN, ESQ.</b> - Year-End Estate & Gift Update - New Cases, Rulings & Legislation

For additional information regarding this committee:  
<http://www.calcpa.org/LA/estate>