



CALIFORNIA SOCIETY OF CPAs
LOS ANGELES CHAPTER
ESTATE PLANNING COMMITTEE
CALENDAR of MEETINGS
2010

January 13, 2010 Andrew Welzel	DAVID SHERAK, ESQ. & CARSTEN HOFFMAN - Transferring Wealth Without Gift Tax (Discounts, Etc.)
February 10, 2010 Nelson Handy	I.R.S. MEETING-KYM TABORN, IRS - 14 th Annual I.R.S. Meeting
March & April 2010	<u>(no meetings- tax season)</u>
May 12, 2010 Tim Anderson	ASHLEY RISNER, ESQ. & JOHN JACOBSON, ESQ. - Funding Stale Trusts; How Many Years Can I Wait?
June 9, 2010 Geoff Bremer	NELSON HANDY, ESQ. & MITCH FREEDMAN, CPA - Estate Planning for Non-Taxable Estates- Why Bother?
July 14, 2010 Richard Gilbert	STEVE LOWE, ESQ. & JUDGE ED ROSS - CPA as Trustee- Should You?
August 11, 2010 Bob Birgen	ANDREA ROSS, ESQ - 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) Geoff Bremer	BILL DOWNS, CPA & (trust officer) - 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	BILL WEINTRAUB, ESQ & KIP DELLINGER, CPA - FLP Planning In Light of IRS Challenges- Update and Opportunities
November 10, 2010 (Joint meeting with LA CPA Attorneys) John Jacobson	BILL STALEY, ESQ. - topic to be determined
December 8, 2010 Ralph Bovitz	ANDY KATZENSTEIN, ESQ. - Year-End Estate & Gift Update - New Cases, Rulings & Legislation

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