

**L. A. CHAPTER OF THE CALIFORNIA SOCIETY OF CPA.s**  
**ESTATE PLANNING COMMITTEE**  
CALENDAR of MEETINGS  
2011

January 12, 2011  
(Joint meeting with  
YEP & Young Lawyers)  
Michael Allmon

**ARNOLD KAHN, ESQ., DONITA JOSEPH, CPA & AUTUMN RONDA, ESQ.** - Ethical Issues of Estate Planning (dual representation, confidentiality, elder abuse, etc)

February 9, 2011  
Nelson Handy

**I.R.S. MEETING –VIRGINIA ADAMS, ESQ.**  
- 15<sup>th</sup> Annual I.R.S. Meeting

March & April 2011

**(no meetings- tax season)**

May 11, 2011  
Bob Birgen

**JONATHAN LURIE, ESQ.** - The Current State of the Estate Tax and Related Planning Considerations

June 8, 2011  
Autumn Ronda  
(Joint meeting with  
PFP Committee)

**JASON TRENTON, ESQ, MICHAEL ROSEN-PRINZ & ANDREW COPANS** - International Estate Planning

July 13, 2011  
Bob Birgen

**RICHARD LEONARD, ESQ. & RANDY WERNER, ESQ, CPA-CAMICO** - Avoiding Malpractice Risks In Estate Planning for CPAs

August 10, 2011  
Bill Downs  
(Joint meeting with  
YEP & Young Lawyers)

**ROBERT BRISKIN, ESQ. , MARTIN NEUMAN, ESQ. & TERENCE NUNAN, ESQ** - Fundamentals of Estate Planning- State Inheritance Taxes; Reduction of Fed Estate Taxes; Dysfunctional Family Planning; Basic Uses of Entities in Estate Tax Reduction

September 21, 2011  
Ashley Copp & Geoff Bremer  
(NOTE DATE CHANGE)  
(Joint meeting with  
Tax Committee)

**JACOB STEIN, ESQ.** - Safeguarding Assets in Your Estate Plan (Including Asset Protection Planning)

October 19, 2011  
(NOTE DATE CHANGE)  
(Joint meeting with  
Tax Committee)  
Bob Birgen

**NELSON HANDY, ESQ, CPA & ROBERT KIES, ESQ.-** Income & Estate Tax Aspects of Grantor Trusts- From the Basics to Advanced Considerations

November 9, 2011  
Bob Birgen

**PAUL HOFFMANN, ESQ.** - Estate Planning Aspects Affecting Business Continuity Arrangements- Both Pre and Post Mortem

December 14, 2011  
Bob Birgen

**ANDY KATZENSTEIN, ESQ.** - Year-End Estate & Gift Update  
- New Cases, Rulings & Legislation

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