



President's Message

Dear Members,

We have two meetings left this season and we will start looking ahead to Board nominations for next year. If you are interested in serving as a Board member, please let us know. One initiative the Board will focus on next year is utilizing social media, so if you have skills in that area, we'd welcome your expertise.

March reminds me of many things: Spring cleaning, Spring break, tax season and St. Patrick's Day. Whatever your priority is this month, we want to see everyone at the March 9th meeting. Joy Soulier has engaged two very special speakers focusing on cost basis planning, a timely tax topic.

Liz Paulus
President

Meeting Speaker and Topic

**John Prokey and Dennis Leonard of the
Ramsbacher Prokey LLP Law Firm**

A Tangled ATRA Web: Income Tax Basis in Modern Estate Planning

One fundamental shift in the post "ATRA" environment is the decreased emphasis on estate and gift tax planning and the increased importance of income tax planning. This program will discuss current perspectives on the related impact on various traditional estate and wealth planning concepts.

John Prokey received his law degree in 1999 and B.S. in 1994 from Santa Clara University receiving "cum laude" honors from law school and undergraduate studies. He is a current member of the State Bar of California Taxation and Trusts/Estates Sections, the American Bar Association, the Silicon Valley Bar Association, the Santa Clara County Estate Planning Council and the Santa Clara County Bar Association.

Dennis Leonard received his law degree in 1999 and LL.M. in Taxation in 2003 from the University of Houston Law Center and his B.S. from the University of San Francisco in 1995. He is a current member of the State Bar of California Taxation and Trusts/Estates Sections, Chair-elect of the State Bar's Estate and Gift Tax Committee, the American Bar Association, the Silicon Valley Bar Association, the Santa Clara County Estate Planning Council and the Santa Clara County Bar Association.

Meeting Date

Monday, March 9, 2015

Scott's Seafood Restaurant, Jack London Square
2 Broadway, Oakland, CA 94607

6:00 PM Wine Reception, 6:30 PM Dinner Meeting

Grilled Pacific Prawns served with a Lemon Butter Sauce and Herbed Rice
or

Pasta Primavera with Fresh Julienned Vegetables, Sundried Tomatoes, Garlic & Grana Cheese



Admin Tip!

Does your assistant register you for meetings?

Many busy members need help booking events. If you have an assistant who you rely upon to register you for meetings and keep track of confirmation emails, please make sure they have your member login information including your **email, password, and credit card you want billed**.

When someone else registers you they can add their email in the registration to receive the same email confirmation that gets sent to you. That way you both have the information.

Many assistants call me unclear on how to register someone for a meeting and often start a second profile of a member as a guest. Please help share this information with them to keep our records correct.

Thank you to our Sponsors!

Pending

AI Statz

