



President's Message

LAST MEETING OF THE SEASON

Dear Members,

All of our meetings are absolutely worthwhile but our last one is the most important! We need everyone's attendance as it is time to vote in the next years' Board members and mingle with your fellow members before summer begins. It is also a wonderful opportunity to enjoy an evening dedicated to Philanthropy from the presentation to our networking time where we will showcase numerous charitable organizations amongst our very own members.

As this is my final newsletter as President, I wanted to acknowledge the tremendous team I've enjoyed working this past year on the Board. Bonnie made all the magic happen behind the scenes and, for that, I am eternally grateful. Joy did a phenomenal job of securing accomplished speakers on various current trending topics. Alan, our longtime Treasurer, is stepping down after many years of great service and we will miss his outstanding reporting! Emerson tended to securing and developing leads to attract new members. Many thanks as well to Giles, Becky, David, Allyson, Carla, Megan, Erin, Jesse and Marcus for your contributions and efforts too numerous to count that helped us achieve our successes this season.

We still have a few slots open on the Board for next season so let the Nominating Committee know of your interest ASAP (at liz.paulus@wellsfargo.com). One initiative the Board will focus on next year is utilizing social media, so if you have skills in that area, we'd especially welcome your expertise.

Liz Paulus
President

Meeting Speaker and Topic

Justin Miller from Bank of New York Mellon Optimizing Charitable Deductions: Tips to Follow & Traps to Avoid

Charitable gifting can be a crucial part of any wealth plan, and following the recent changes in tax law, optimizing charitable tax deductions can be more important than ever. In this session, we will explore practical solutions and innovate ways to introduce individuals and their families to timely and advantageous charitable gifting solutions based on actual client experiences. This program takes an in-depth look at charitable gifting options and trends including: drivers and limitations of giving, valuations, written acknowledgements, charitable remainder and lead trusts, IRAs, donor advised funds and family philanthropy.

As a national wealth strategist at BNY Mellon, Justin Miller works collaboratively with other advisors to provide comprehensive wealth planning advice to clients and their families.

Mr. Miller is an adjunct professor at Golden Gate University School of Law, an executive committee member of the State Bar of California Taxation Section and the editor-in-chief of the California Tax Lawyer. He has received a master of laws in taxation and a juris doctor from New York University School of Law and a bachelor's degree, with honors, from the University of California at Berkeley.

Meeting Date

Monday, May 11, 2015

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

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

Beef Brochette - Tenderloins of Beef on a Bed of Seasoned Rice with Peppercorn Sauce
or
Vegeterian Wild Mushroom Ravioli - Portobello Cream Sauce



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!

Meeting Sponsor

Alan Statman

Wine Sponsor

David Little



Hand & Little, PC