



President's Message

Congratulations to past president and board member Jesse Walden, the winner of the "Bring a Guest" raffle on October 19. We had many guests join us for our meeting and decided to extend the "Bring a Guest" raffle into our meeting on November 16. All members that invite guests will be entered into a raffle for a Whole Foods gift card. Remember that Thanksgiving is just around the corner and Whole Foods likely has something for everyone!

Welcome our two newest members Gary Jang from DZ Hillips and Kirsten Weisser from Evercore!

A great big thank you to all members that have stepped up to become meeting and wine sponsors. Scotts Restaurant has graciously waived the corkage fee this year, so we have decided to reduce the cost of wine sponsorship from \$240 to just \$50, plus the cost of the wine. This is a great time to become a wine sponsor. The only two wine sponsor opportunities left are March and May, grab one quick! November will be the last meeting in 2015, so be sure to join us.

The networking party will be January 21, 2016! Save the date, watch for the official invitation in your inbox and start thinking about if you'd like to be a networking party sponsor. As this is the last correspondence before the holidays, please have a safe and happy holiday season.

Warm regards,

Joy Soulier
President

Meeting Speaker and Topic

Jeffrey Haskell, Foundation Source

**Good intentions can often lead to unintended consequences
An interactive presentation to help your private foundation clients
identify and avoid "self-dealing" incidents**

Program description: For private foundations, trouble often falls under the category of "self-dealing," which can arise in the context of most business and financial transactions between a foundation and its disqualified persons or "insiders." In this scenario-based presentation, tax attorney and private foundation expert Jeffrey Haskell, J.D., LL.M., will review the many ways that insiders unknowingly self-deal, and the stiff penalties and corrective action requirements associated with such activities.

Speaker Bio: As Chief Legal Officer at Foundation Source, Jeffrey Haskell is responsible for providing guidance on legal and tax issues to the foundations that the company serves. Prior to joining Foundation Source, Mr. Haskell was an associate at the law firms of Kronish Leib Weiner & Hellman LLP and Olshan Grundman Frome Rosenzweig & Wolosky, in the Tax and Trusts and Estates departments. He also previously worked at Coopers & Lybrand in the Business Tax Planning Group. Mr. Haskell is involved in pro bono work for public charities and has served as an adjunct

lecturer at Baruch College of Accountancy, where he taught corporate tax law. His Articles have appeared in Trusts & Estates and Taxation of Exempts magazines, and in Cardozo Law Review. Mr. Haskell is a graduate of Yeshiva University and the Benjamin N. Cardozo School of Law, where he was a member of the Cardozo Law Review. He received a Masters of Law in Taxation from New York University School of Law, where he was a member of the NYU Tax Law Review.

Meeting Date

Monday, November 16, 2015
6:00 PM Wine Reception, 6:30 PM Dinner Meeting

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

PARMESAN CRUSTED BREAST OF CHICKEN - Leek and Lemon Cream Sauce
or

STUFFED PORTOBELLO MUSHROOM Diced Peppers, Onions, Mushrooms Topped with Mozzarella



Admin Tip!

Can't attend an event you registered for?

Unfortunately we can't offer refunds for paid registrations.
123Signup charges us a fee so we can't refund credit cards.

Thank your to our Sponsors!

Meeting Sponsor

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