



President's Message

I'd like to thank our members who continue to bring guests to our meetings. We've had an outstanding line-up of speakers this year and showing potential new members what great programs we have is the best way to continue to grow our membership. I'd also like to single out Greg Finn, our programs director for putting together such outstanding speakers for us.

As we move into March I'm reminded that my tenure as President will soon be over. We are going to have several board vacancies this year and are looking for members who are interested in serving on the board to help us to continue to make the Tri-Valley Estate Planning Council the best council in the Bay Area. If you are interested in becoming a board member or nominating someone else please contact myself or Mary Ballin. Our slate of directors for 2013-2014 will be announced at the May meeting and voted on at our June social.

Also, we continue to grow our online presence through our group on Linked In. This is a great way to get up-to-date news on upcoming meetings and network and connect with our membership. Click on: <http://www.linkedin.com/groups/TriValley-Estate-Planning-Council-4561590/about> and join today!

This meeting is sponsored by:

Greg Finn
Fremont Bank Wealth Management
3909 B Decoto Rd. - Fremont, CA 94555
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FREMONT BANK
WEALTH MANAGEMENT SERVICES

Taxable Installment Sales

We are pleased this month to present well-known attorney, author and lecturer **Peter Myers** of Myers Urbatsch P.C. He is a Certified Specialist in Estate Planning, Trust and Probate Law and was named one of "Top100" attorneys in the U.S. by Worth Magazine and The Robb Report.

What are the pitfalls and, in some instances, opportunities posed by intra-family installment sales in estate planning?

In most instances intra-family installment sales take place between the senior generation and an intentionally defective irrevocable trust (IDIT or IDGT).

- Why?
- What will we do if the Obama "Greenbook proposal" goes into effect, making IDITs unusable?
- Even if we are allowed to use an IDIT as the recipient vehicle, do our clients really want to do so?
- What is the income-tax effect of deliberately making a family member's trust a Non-Grantor Trust?

Join us for an interactive discussion about intrafamily sales, as opposed to intrafamily gifts, in general.

Thursday, March 7, 2013

Marriott Pleasanton
For Directions click [HERE](#)

6:00 PM Wine and Registration
6:30 PM Dinner and Speaker

\$40 Members Pre-Registration
\$45 - Call in after 1:30 PM on Feb 5
\$45 Guests

Reserve TODAY!!

<https://www.123signup.com/calendar?org=tvepc>

Send a check to the TVEPC office
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