



Richard A. Oshins
Oshins & Associates, LLC

THE PERFECT TRUST

Competent advisors would never recommend a business entity that could be pierced by creditors or is tax inefficient. Unfortunately, with shocking regularity planners are too passive during the estate planning process in advising clients about the unnecessary and substantial harm that will occur by not using a properly designed trust. Risking the appearance of blasphemy, we will explore the viability of why there appears to be a single trust blueprint, with minimal, but meaningful alterations, that is best for all inheritors, including powerful income tax planning opportunities with reverse, lateral and down-stream planning.

Richard A. Oshins is a member of the Las Vegas law firm of Oshins & Associates, LLC where he concentrates in tax and estate planning with a substantial emphasis on multi-generational wealth planning particularly with regard to closely held entities. He is regarded as one of America's top estate planning lawyers advising wealthy clients throughout the United States. Dick has been inducted into the Estate Planning Hall of Fame by the National Association of Estate Planners & Councils, selected by Worth magazine as one of the Top 100 Attorneys in the United States and has been named one of the 24 "Elite Estate Planning Attorneys" by the Trust Advisor. Prior to coming to Nevada, he served as a law clerk for the United States Court of Claims in Washington, D.C. and as an Attorney-Advisor in the Office of Tax Legislative Counsel, U.S. Treasury Department, in Washington, D.C.

Join us on Wednesday, January 18, 2017 at 5:30 PM
At the Omni Hotel
500 California (at Montgomery) in San Francisco.

\$75 Preregistered Members \$95 Preregistered Guests
At the door – Registrations still needed - \$80 members and \$100 guests
Reservation needed by January 16, 2017

Send a check with names to: SFEPCC – 767 Brannan Place – Concord, CA 94518
Or pay by credit card – <http://www.123signup.com/calendar?org=sfepcc>

Continuing Education Credit:

MCLE: This activity is approved for MCLE credit of one hour by the State Bar of California.
CPA & CFP®: A sign-in sheet and an attendance certificate are provided at each meeting.

Excused Absence:

Members can request an excused absence by mailing a letter, or sending an email (SFEPCC@astound.net) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.