



Jonathan Blattmachr

PLANNING UNDER THE NEW PERMANENT ESTATE, GIFT AND INCOME TAX RULES

We have the great pleasure of announcing that JONATHAN BLATTMACHR has agreed to present at our March meeting on the topic of planning under the new permanent estate, gift and income tax rules, including planning with and for portability.

Mr. Blattmachr is a nationally renowned lecturer and author on estate and trust taxation and charitable giving. He has authored or co-authored five books and over five hundred articles on estate planning topics. He brings over thirty-five years of experience of trusts and estates law. He is a retired member of Milbank Tweed Hadley & McCloy and the Alaska, California and New York Bars. Jonathan is currently a Principal of Eagle River Advisors, a boutique advisory firm dedicated to developing and implementing innovative wealth and gift and estate tax planning strategies on behalf of high net worth individuals and families. He also serves as the Director of Estate Planning for the Alaska Trust Company and is a co-author and developer of Interactive Legal System's Wealth Transfer Planning software system.

The event is *exclusively* for San Francisco Estate Planning Council members and their guests. We expect this event to sell out early, so please register now.

Join us on **Wednesday, March 20, 2013** at 5:30 PM at the Omni Hotel
500 California (at Montgomery) in San Francisco.

\$70 Preregistered Members \$75 Preregistered Guests

At the door – Registrations still needed- \$75 members and \$80 guests

If you or your guest requires a vegetarian meal please send an email to: sfepc@astound.net

Send a check with names to: SFEPCC – 767 Brannan Place – Concord, CA 94518

Or pay by credit card – <http://www.123signup.com/calendar?org=sfepc>

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.