



Matthew Burke

2015 UPDATES ON PROPOSITION 13 CHANGE IN OWNERSHIP & TRANSFER TAXES FOR ESTATE PLANNING PROFESSIONALS

Please join us for our first program of the fiscal 2015 year. Matthew Burke will give us an update on Proposition 13 and some of common problems and challenges it creates for estate planners and fiduciaries. Matthew's extensive experience in working with both professional real estate investors as well as HNWI individuals and investors in structuring complex transactions to facilitate succession planning while minimizing or avoiding property taxes and property tax reassessments will provide some extremely helpful background for all of us with clients with significant real estate assets.

Matthew is a Managing Director in PwC's State and local tax real estate practice, specializing in real property transfer taxes, property taxes and property reassessment. Before joining PwC, he practiced law with Pillsbury Shaw Pittman, working exclusively on property tax and transfer tax issues primarily focusing on acquisitions, reorganizations and solar development. Prior to that, he was Senior Tax Counsel with the California State Board of Equalization where he specialized in property tax assessment, Proposition 13 changes in ownership, assessment of new construction, the solar tax exclusion and taxation of possessory interests.

Join us on Wednesday, September 16, 2015 at 5:30 PM
At the Omni Hotel
500 California (at Montgomery) in San Francisco.

\$75 Preregistered Members \$80 Preregistered Guests
At the door – Registrations still needed - \$80 members and \$85 guests
Reservation needed by September 14, 2015

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.