



**Mark L. Vorsatz**  
*Andersen Tax*

## **“THE ROAD AHEAD”**

Mark will discuss the individual income tax changes and estate and gift tax changes as well as relevant business provisions. He will address the impact of the changes on both overall restructuring of one’s financial affairs as well as the impact on investment planning and allocation issues. There are clear “Winners and Losers” involved with the tax bill and those who will benefit or will be adversely affected by the changes. Many planning opportunities have surfaced as this will undoubtedly be the “full employment” act for tax professionals, estate planning lawyers, investment professionals and others in the financial services area.

Mark is Managing Director and CEO of Andersen Tax. He Co-Founded the firm under the name WTAS in 2002. Mark works exclusively with individuals in the design and implementation of customized income tax and estate planning solutions. He focuses on preserving wealth for multi-generational families. Mark has over 35 years of experience in tax practice. Before joining Andersen Tax, he was a Partner at Arthur Andersen from 1987 to 2002. Mark served on the firmwide Family Wealth Planning Team from 1982 to 2002 and led the firm’s Private Client Service Group in San Francisco. He has lectured extensively on estate planning and has taught estate planning in the graduate tax program at Golden Gate University. He regularly lectures at University of California, Hastings College of the Law in San Francisco.

Join us on **Wednesday, January 17, 2018** 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 15, 2018*

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

**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 (SFEPC@astound.net) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.