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Tax Policy for Estate Planners: A View from Washington, D.C.

Beth Shapiro Kaufman of Caplin Drysdale, LLC, Washington, D.C. will present on “Tax Policy for Estate Planners: A View from Washington, D.C.” Ms. Kaufman worked for over six years in the Treasury Department’s Office of Tax Policy. Serving first as Attorney Advisor and then as Associate Tax Legislative Counsel. Ms. Kaufman had principal responsibility for all tax policy matters affecting trusts and estates, including estate, gift, and generation-skipping transfer taxes, as well as income taxation of trusts and estates. Ms. Kaufman is a frequent lecturer on topics related to estate planning and has spoken before numerous professional groups, including the University of Miami Heckerling Institute on Estate Planning, ALI-ABA, the ABA Tax and Real Property, Probate and Trust Sections.

Join us on **Wednesday, March 19, 2014** 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

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.