



Jacob Stein, J.D., LL.M.

ASSET PROTECTION PLANNING FOR CALIFORNIA RESIDENTS

Mr. Stein will discuss the fundamentals of asset protection planning for California residents with an emphasis on planning for community property assets as well as strategies and solutions used to protect common assets such as houses, bank and brokerage accounts, businesses, professional practices and retirement plans. He will share real-life stories and anecdotes, and will present a very practical approach to protecting assets in California. The discussion will also cover asset protection planning in a troubled economy, focusing on protecting assets from lenders and landlords and how to plan after a lawsuit, a default or an accident.

Jacob Stein (J.D.; LL.M.) is a Certified Tax Law Specialist. He is the author of numerous books including, *A Lawyer's Guide to Asset Protection Planning in California* (2011), and his most recent, *International Joint Ventures: A Concise Guide for Attorneys & Business Owners* (2014). In addition, his manuals on *Advanced Tax Planning* and *Asset Protection Planning* have been used by the California CPA Education Foundation for over 10 years. Mr. Stein has taught over 500 seminars and published over two dozen scholarly articles. His asset protection clients include Forbes 400 families, officers and directors of Fortune 100 companies, Russian oligarchs, tech tycoons, real estate developers and business owners of all stripe.

Join us on **Wednesday, January 21, 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 January 19, 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.