



Wendy Goffe

**ADMINISTERING UNUSUAL ASSETS WITH PURPOSE TRUSTS:
WHAT TO DO WHEN YOU FIND OUT GRANDMA HAD A GUN COLLECTION**

A Purpose Trust can be used to carry out a specific objective rather than for the benefit of individual beneficiaries. Purpose Trusts are used most frequently for the care of pets, or the ownership of regulated assets such as firearms. But they shouldn't be forgotten as a planning tool for airplanes, cars, wine and other collectibles, meant to be held long-term. This presentation will examine some of the issues you may want to consider in your practice raised by Purpose Trusts.

Wendy Goffe has more than 20 years of experience counseling clients on estate planning issues. Her experience includes advising clients on matters including probate and trust administration, estate and gift taxation, charitable giving and nonprofit trusts and corporations, family-owned business succession and issues concerning unmarried couples. Wendy is a regular speaker at local, regional and national events addressing a number of estate planning topics. She has also been interviewed by and written for many national publications.

Join us on Wednesday, May 20, 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 May 18, 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=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 (SFEPCC@astound.net) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.