



**Cristine M. Sapers &
Jonathan Rikoon**

**ESTATE PLANNING FOR PRINCIPALS
OF PRIVATE EQUITY AND HEDGE FUNDS**

Please join us for our second program of fiscal 2015 when Cristine Sapers and Jonathan Rikoon of Loeb & Loeb will discuss “Estate Planning for Principals of Private Equity & Hedge Funds”. Cristine and Jonathan are Partners at Loeb & Loeb where they provide sophisticated estate and tax planning services for wealthy individuals and families. Both of them have substantial experience in working with hedge fund managers and principals of private equity firms on estate planning in connection with their funds. Their talk will cover estate planning strategies and vehicles for these clients including the economics and legal structure of these types of funds, pitfalls under section 2701, valuation issues and the use of a combination of classic estate planning tools such as grantor trusts, LLCs and partnerships, installment sales and GRATs tailored for the specifics of the fund structure.

Join us on **Wednesday, November 18, 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 November 16, 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.