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Marital Agreements: The Must Haves for High Net Worth Clients

The presenters will review cohabitation, pre-marital, and post-marital agreements, including what they contain, who should consider putting them in place, and why they are important. This presentation will provide guidance on issues that trust and estate attorneys should know about pertaining to death and divorce in drafting these and trust agreements. The whole process of creating agreements will be outlined, including the format of client discussions and four-way meetings, along with the importance of thorough financial disclosures in preventing future attacks. The presenters will share examples of drafting techniques they have been using, actual client cases and marital agreements they have created, as well as trends they have been seeing in marital agreements over the last five years.

Monica Mazzei is a partner at Sideman & Bancroft, LLP in San Francisco, and a Certified Family Law Specialist representing clients in the Bay Area, with a concentration in San Francisco and Silicon Valley, throughout the litigation process and in mediation. She focuses her practice exclusively on family law and specializes in dissolution actions involving complicated valuation and financial matters, and complex community property and support issues, including international issues. Monica also negotiates and drafts cohabitation agreements, premarital and post-marital agreements for her clients.

Anne Cochran Freeman, Esq., is a partner at Sideman & Bancroft, LLP in San Francisco, where she co-leads the firm's Family Law Group. Anne is certified by the State Bar Board of Legal Specialization as a Certified Family Law Specialist (CFLS), and she was recognized in the 2018-2019 Super Lawyers Northern California lists, and on the Northern California Rising Star lists from 2015-2017. Anne's practice focuses on resolving high conflict child custody and complex financial issues. She has successfully litigated family law cases involving complex child custody disputes in both private adjudication and public court proceedings. Before becoming an attorney, Anne was a business management consultant, providing leadership and organizational development consulting for Fortune 500 companies.

Join us on **Wednesday, November 20, 2019** 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 November 18, 2019

Send a check with names to: SFEPC – 767 Brannan Place – Concord, CA 94518

Or pay by credit card – <http://www.123signup.com/calendar?org=sfepc>

If you or your guest requires a vegetarian meal, please send an email to: sfepc@astound.net

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.