San Francisco
Estate Planning Council

Stephanie Loomis-Price, Esq.
Winstead PC
Houston

Julie Miraglia Kwon
Partner
McDermott Will & Emery LLP
Silicon Valley, San Francisco

Mind Your Own Business: Fiduciaries, Families, and Business Succession

Many small business owners have no exit strategy. Who will take over when Gen One steps aside? Business and estate planning counsel can play a crucial role in assisting family business owners in identifying issues and crafting a plan to ensure smooth succession of business operations to the next generation. This presentation by a litigator and a planner will explore pitfalls in the process, leaving attendees with practical pointers for implementation with minimal conflict.

Stephanie Loomis-Price is a shareholder in Winstead's Wealth Preservation Practice Group, where she handles federal gift and estate tax litigation against the Internal Revenue Service across the country, as well as state fiduciary and probate controversy work in Texas courts. She also counsels clients nationally regarding complex estate administration and litigation and audit risk minimization.

Board Certified in Estate Planning and Probate Law, Stephanie is a Regent and Fellow of the American College of Trust and Estate Counsel (ACTEC), where she serves as Chair of the Business Planning Committee. In addition, Stephanie serves as Chair Elect for the Real Property, Trust & Estate Law Section of the American Bar Association.

Stephanie lives in the Houston area with her husband, Larry Loomis-Price, and their two sons, Connor and Corwin.

Julie Miraglia Kwon is a partner at McDermott Will & Emery LLP. She advises clients regarding estate, gift and generation-skipping transfer tax issues; charitable planning and exempt organization compliance; trust and estate administration; and contested trust and tax matters. Julie is an ACTEC Fellow, co-author of the tax treatise, "Generation-Skipping Transfer Tax" (by Harrington, Plaine, Zaritsky & Kwon, for Warren Gorham & Lamont), and the Tax Management Portfolio titled "Generation-Skipping Transfer Tax" (by Harrington & Kwon, for Bloomberg Law), and member of the Board of Directors of the Silicon Valley Community Foundation. She is also a Supervisory Council Member for the Real Property, Trust & Estate Section of the American Bar Association, past Chair of the Income & Transfer Tax Planning Group and Estate & Gift Tax Committee, past co-chair of the GST Tax Committee, of the Section. Julie is also a past member of the Executive Committee of the Trusts & Estates Section of the State Bar of California. Julie received her J.D. from Yale Law School, where she was Executive Editor of the *Yale Journal of Law & the Humanities*, and her B.A., with distinction, from Stanford University. She is admitted to practice in California and Illinois.

Join us on **Wednesday, March 18, 2020** 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 March 16, 2020
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.