



SAVE THE DATES

2020 SFEPSC SPRING SOCIAL

Mechanics Bank Rooftop Deck
Live Entertainment, Food, Beer, Wine and Great Company!
Thursday, May 28, 2020
6:00 PM-8:30 PM

SFEPSC & GGU Symposium:
TAX PLANNING ISSUES FOR THE ESTATE PLANNER
Golden Gate University
Friday, May 29, 2020
8:00 AM-3:30 PM

Speakers & Topics

Matthew Burke
California Real Property Tax Issues in Estate & Post Mortem Planning

Julie Kwon
GST Tax Planning, Pitfalls & Pointers

Syida Long & Julie Kwon
QSBS

Steve Trytten
Planning Under the SECURE Act

David Sacarelos & Steve Wilson
Qualified Opportunity Zone Discussion Panel

For sponsorship opportunities, contact Hilary Pierce at (415) 733-3911