San Francisco
Estate Planning Council

Paul S. Lee, J.D., LL.M
Global Fiduciary Strategist
Senior Vice President
Managing Director
The Northern Trust Company
Wealth Management and Global Family &
Investment Offices Group

Shining Light through the Darkness: Planning in the Shadow of Uncertainty, Social Distancing, and Fear

The COVID-19 pandemic has stalled global economies, causing asset values and interest rates to plummet. Clients are fearful for their health and wealth, and of the uncertainty that lies ahead. The best estate planners can be a beacon of light during these dark times, providing wise counsel and devising plans that clients can act upon today, with assurance that they will survive these turbulent times (and even take advantage of the current planning environment). This presentation will discuss the best planning ideas and techniques, in light of these unprecedented times.

Paul S. Lee is the Global Fiduciary Strategist of The Northern Trust Company, within the Global Family & Private Investment Offices Group and Wealth Management division of Northern Trust. He is also a Senior Vice President and Managing Director of the company. Prior to joining Northern Trust, he was at Bernstein Global Wealth Management as National Managing Director, and a partner in the Atlanta-based law firm of Smith, Gambrell & Russell, LLP.

Paul is a Fellow of the American College of Trusts and Estate Counsel, has been inducted into the NAEPC Estate Planning Hall of Fame®, and designated an Accredited Estate Planner® (Distinguished). He is the American Bar Association Advisor to the Uniform Law Commission Uniform Fiduciary Income and Principal Act. Paul is a member of the American Bar Association, Florida Bar, and State Bar of Georgia.

A frequent lecturer and panelist on investment planning, tax and estate planning, Paul has spoken at the Heckerling Institute on Estate Planning, **ACTEC** National Meeting, Southern Federal Tax Institute, USC Institute on Federal Taxation, Southern California Tax & Estate Planning Forum, Notre Dame Tax and Estate Planning Institute, AICPA National Tax Conference, and the AICPA Advanced Estate Planning Conference. His articles have been published by *The ACTEC Law Journal*, *Tax Notes*, *BNA Tax Management Estates, Gifts & Trusts Journal*, *BNA Tax Management Memorandum*, *Estate Planning Journal*, *Trusts & Estates*, *Estate Planning & Community Property Law Journal*, *The Practical Tax Lawyer*, *Major Tax Planning*, and the *Emory Law Journal*. Paul co-authored the law review article, "*Retaining, Sustaining and Obtaining Basis*," which was awarded Outstanding Law Review Article in 2016 by the Texas Bar Foundation.

He is a member of the Advisory Committee of the Heckerling Institute on Estate Planning, Bloomberg BNA Estates, Gifts and Trusts Advisory Board, the University of Florida Tax Institute Advisory Board, and the Wilson Society Advisory Council for the Hospital for Special Surgery in New York City. He proudly serves as an Admiral in the Great Navy of the State of Nebraska.

Join us on **Wednesday, May 6, 2020**, 4:30 PM – 6:00 PM
Zoom Meeting
FREE for Preregistered Members $35 for Preregistered Guests
Virtual Meeting – Pre- Registration Required
Reservation needed by May 4. 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
Thank you to our meeting's sponsor:

First Republic
Private Wealth Management
It's a privilege to serve you®

MCLE: This activity is approved for MCLE credit of one hour by the State Bar of California, CPA & CFP®.

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.