



**Reynolds T. Cafferata**  
Partner  
**Rodriguez, Horii, Choi & Cafferata LLP**

## **Year-End Charitable Planning**

Please join us for the next SFEPC meeting on **November 29, 2023**, at the Omni Hotel in San Francisco. We will be meeting at **5:00 pm for a social hour** with hors d'oeuvres and cocktails, followed by our featured speaker, **Reynolds T. Cafferata at 6:00 pm.**

Timing is everything in comedy and in charitable giving. This presentation will cover the Hoensheid case, an important new ruling on the timing of charitable gifts as well as donor advised fund gifts and IRA qualified charitable distributions that your clients might consider by year end.

**Reynolds T. Cafferata** is a partner at a tax law firm, Rodriguez, Horii, Choi & Cafferata LLP, and represents charities and donors on issues related to charitable giving, governance, charitable trust litigation and tax. Mr. Cafferata's clients include universities, hospitals, community foundations, private foundations as well as banks, and philanthropists. Mr. Cafferata is a frequent speaker and writer on charitable topics, former adjunct professor at the USC School of Law, a member of the USC Tax Institute Planning Committee, member of the American College of Trust and Estate Counsel, past board member of the National Committee on Planned Giving, and past chair of the National Conference on Planned Giving. He was named a Daily Journal 2016 Clay Awards Winner, "Attorney of the Year for Extraordinary Achievement in 2015 Appellate Practice" for his work on Estate of Duke, and the 2018 Lawyer of the Year in Los Angeles, Non-Profit/Charities Law and 2011 Los Angeles Lawyer of the Year Trusts and Estates by Best Lawyers. Mr. Cafferata is a currently Chancellor of the Episcopal Diocese of Nevada and a board member of the Episcopal Church Foundation.

**Join us on Wednesday, November 29, 2023**

**5:00 PM – 6:00 PM Social Networking/hors d'oeuvres and cocktails**

**6:00 PM – 7:00 PM Meeting**

**Omni Hotel - 500 California (at Montgomery) in San Francisco**

**\$85 Pre-registered Members - \$105 Pre-registered Guests**

***At the door – Registrations still needed - \$90 members and \$110 guests***

**Pre-Registration is Required**

**Reservation needed by November 27, 2023**

**Cancellations must be received three business days prior to the meeting.**

[Register Here](#)

MCLE & CFP: This activity may be approved for CE credit of one hour by the State Bar of California & CFP® Board.  
Excused Absence: Members can request an excused absence by sending an email (info@sfepec.org) to the Council Office prior to the meeting.