



Jennifer Scharre
Coblentz, Patch, Duffy & Bass LLP

Note Location:
The City Club of San Francisco

Planners Plan and Litigators Laugh: How Will a Court Interpret Your Well-Intended Plan?

Please join us for the next SFEPCC meeting on **January 15, 2025**. We are back at **The City Club of San Francisco** this month. We will be meeting at **5:00 pm** for a social hour with hors d'oeuvres and cocktails, followed by our featured speaker, **Jennifer Scharre at 6:00 pm**.

Jennifer will discuss the different types of power to act on behalf of an individual through estate planning documents as well as the complexities associated with amending such documents. This presentation will review different case law where courts have interpreted language in estate planning documents resulting in a range of results for beneficiaries with a focus on amending instruments and using trust assets to pay trustee's attorneys' fees. Jennifer will provide participants practice tips throughout to avoid unintended results.

Jennifer Scharre is a partner in the law firm Coblentz, Patch, Duffy & Bass LLP and is a Certified Specialist in Estate Planning, Trust and Probate Law by the California Board of Legal Specialization. Jen's practice focuses on sophisticated wealth transfer strategies for high net worth clients, including founders, individuals at startups, and clients with large real estate portfolios. Jen's prior practice at a boutique trusts and estates firm makes her uniquely equipped to solve both the legal and tax issues that families face as well as the practical issues of family dynamics, succession planning, and wealth preservation. Jen serves on the Executive Committee of the Trusts and Estates Section of the California Lawyers Association and on the Board of Trustees of the Silicon Valley Bar Association (SVBA), where she is also Treasurer.

Join us on Wednesday, January 15, 2025

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

6:00 PM – 7:00 PM Meeting

NOTE LOCATION FOR THE JANUARY MEETING:

THE CITY CLUB OF SAN FRANCISCO – 155 Sansome Street, 11th Floor

\$125 Pre-registered Members - \$175 Pre-registered Guests

At the door – Registrations still needed - \$150 members and \$200 guests

Pre-Registration is Required

Reservation needed by January 13, 2025

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

[Register Here](#)

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

268 Bush Street, #4222 San Francisco, CA 94104