

PEPNET

Pepperdine Estate Planning Network

ESTATE PLANNING IN THE CURRENT ENVIRONMENT & ANTICIPATED CHANGES TO THE ESTATE AND GIFT TAX LAWS

Allan Cutrow (North Chapter) / Felicia Chang (South Chapter) *Mitchell Silberberg & Knupp, LLP*

North Chapter—Wednesday, September 23, 2009

South Chapter—Thursday, September 24, 2009

Estate Planning in the Current Environment & Anticipated Changes to the Estate and Gift Tax Laws

Come learn about:

- ▶ Working with existing economic circumstances and anticipated changes in the estate and gift tax laws.
- ▶ Depressed asset values and unique estate planning opportunities.
- ▶ Reunification of the estate and gift tax credits.
- ▶ New Treasury proposals and recently introduced legislation in the House.

Allan Cutrow *Mitchell Silberberg & Knupp, LLP*

is Chair of Mitchell Silberberg & Knupp's prominent Trusts & Estates Practice which is well known for providing estate and gift planning, administration, litigation and dispute resolution. Mr. Cutrow specializes in tailoring sophisticated estate plans to fit each client's wealth, asset mix, family situation and planning goals and counts among his many clients art collectors, artists and entertainers as well as closely held businesses and high net-worth individuals. Named as one of the "Best

Lawyers in America in Trusts and Estates Law" by The American Lawyer and a Fellow of The American College of Trust and Estate Counsel, Mr. Cutrow is also a popular speaker on topics that include estate planning and administration and dispute resolution.

Felicia Chang *Mitchell Silberberg & Knupp, LLP*

is a senior associate in Mitchell Silberberg & Knupp's prominent Trusts & Estates practice. Ms. Chang represents high net-worth individuals in estate planning, trust administration, probate and complex tax matters. She also assists wealthy families and individuals to meet their philanthropic objectives by helping them select the appropriate charitable planning vehicle and identifying the tax consequences of different proposed structures. Ms. Chang is currently the Second Vice-Chair of the Executive Committee of the Los Angeles County Bar Association Taxation Section. She was Co-Chair of the 2009 Washington Delegation. Ms. Chang was also a member of the 2007 Washington Delegation and was one of the attorneys selected by the California tax bar to present proposed changes to the tax law to the IRS, Treasury, House Ways & Means and Senate Finance Committees, and the Tax Court.

North Chapter

Please join us on
Wednesday, Sep 23
Speaker: Allan Cutrow

12 noon–1:30 p.m.
The Regency Club
Penthouse Room
10900 Wilshire Blvd.
Los Angeles, CA 90024

South Chapter

Please join us on
Thursday, Sep 24
Speaker: Felicia Chang

12 noon–1:30 p.m.
The Pacific Club
4110 MacArthur Boulevard
Newport Beach, CA 92660

Schedule

Networking Reception
12 noon–12:15 p.m.

Presentation
12:15 – 1:30 p.m.

Pepperdine University's Center for Estate and Gift Planning is a State Bar of California MCLE provider. This program has been submitted to the Certified Financial Planners Board for CE credit. Additionally, this program follows the CE regulations as outlined in the California Accountancy Act for Certified Public Accountants. The program is submitted for approval by the State of California's Department of Insurance for one hour of CE credit and is approved for one hour of MCLE credit.

PEPNET

RSVP by September 14, 2009

Our new yearly \$250 payment option pays for three meetings (and parking expenses) for you and one guest.

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REGISTRATION AND PAYMENT

Name _____
Company _____
Guest _____
Phone _____
E-mail _____

___ 1-year PEPNET membership @ \$250 * ___ Non-member(s) @ \$85

Credit card # _____

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Total \$ _____ Checks payable to: *Pepperdine University*

___ North Chapter, Wednesday, September 23, 2009

___ South Chapter, Thursday, September 24, 2009

* PEPNET membership includes meeting and parking cost for you and one guest



WHAT IS PEPNET?

PEPNET is a mutual-benefit society sponsored by Pepperdine University for estate planning professionals. This professional organization was created in 1998 by the Center for Estate and Gift planning to provide quality education for professionals in the estate planning arena and to facilitate a productive and mutually rewarding relationship with its members.

MEETINGS

Members meet three times annually at convenient locations to strengthen their relationships, to network with other professionals, and to participate in continuing education seminars.

MEMBERSHIP

Membership is open to all professions, but primarily comprises attorneys, accountants, financial planners and consultants, trust officers, and life insurance professionals.

MEMBERSHIP INCLUDES

- ▶ Continuing education credit.
- ▶ Listed in the PEPNET directory in print and on the Web.
- ▶ Access to the PEPNET page on LinkedIn.
- ▶ Weekly e-newsletter with relevant estate planning topics.
- ▶ Ability to network with top estate planning professionals.
- ▶ Parking at PEPNET meetings.
- ▶ Special invitations and priority seating with concierge service at Pepperdine events.

SPONSORED BY PEPNET MEMBER:

Emily R. Bullis

Vice President, Wealth Management Advisor

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WEALTH MANAGEMENT SERVICES

CENTER FOR ESTATE AND GIFT PLANNING

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