The 6th Annual Jerry A. Kasner Estate Planning Symposium

was held on

Wednesday, September 30, 2009 at the DoubleTree Hotel – San Jose, CA

2009 presenters and topics
More information about Jerry Kasner

2009 Kasner Symposium Sponsors

Premier Sponsor

U.S. TRUST
Bank of America Private Wealth Management

Lunch Sponsor
Bernstein Global Wealth Management
WealthPLAN

Primary Sponsors
American Trust
BNY Mellon Wealth Management
Northern Trust

Major Sponsors
Borel Private Bank & Trust Company
Northwestern Mutual Financial Network
RBC Wealth Management
Triplett Financial & Insurance Services

Table Sponsors

Aaron, Riechert, Carpol & Riffle, APC
Barulich Dugoni Law Group, Inc.
Beck, Ross, Bismonte & Finley, LLP
Berger/Lewis Accountancy Corporation
Boitano, Sargent & Lilly, LLP
Burr, Pilger & Mayer
Carr McClellan Ingersoll Thompson & Horn
Crist, Schulz, Biorn & Shepherd
Delucchi, Hawn & Co., LLP
Ferrari Ottoboni Caputo & Wunderling LLP
Financial Architects Partners
Fremont Bank
Hopkins & Carley
Jorgenson, Siegel, McClure & Flegel, LLP
Lakin Spears LLP
Larry S. LaMantia, Jr., Attorney at Law
Law Offices of David J. Arata
Lynn Stutz, Attorney at Law
New York Life Insurance Company
Petrinovich Pugh & Company LLP
Ramsbacher Prokey LLP
Temmerman, Cilley & Kohlmann, LLP
Thoits, Love, Hershberger & McLean
WealthPLAN
Wilson Sonsini Goodrich & Rosati Foundation

2009 Kasner Symposium Presenters and Topics

WELCOME SPEAKER

Amanda Wallis | Northern California Market Executive – U.S. Trust

MORNING SPEAKERS

CURRENT CALIFORNIA DEVELOPMENTS IN ESTATE PLANNING AND ADMINISTRATION Robert Temmerman, Esq. | Temmerman, Cilley & Kohlmann, LLP

CURRENT FEDERAL TAX DEVELOPMENTS IN ESTATE PLANNING Michael J. Jones, CPA | Thompson Jones LLP

FROM NASCAR CONDOMINIUMS TO PRIVATE MAUSOLEUMS: KEEPING THE VACATION HOME IN THE FAMILY Wendy Goffe, Esq. | Graham & Dunn PC

LUNCH SPEAKERS

FAMILY DYNAMICS Dr. Eileen Gallo and Jon Gallo, Esq. | Gallo Consulting, LLC

AFTERNOON BREAKOUT SPEAKERS

BEYOND TRANSFER TAXES: WHAT EVERY ESTATE PLANNER SHOULD KNOW ABOUT PARTNERSHIPS Paul “Chip” Lion, Esq. | Morrison & Foerster, LLP

ILIT FIDUCIARY LIABILITY: WHAT YOU NEED TO KNOW TO BEST SERVE YOUR CLIENT’S BENEFICIARIES Richard M. Webber | The Ethical Edge, Inc.

THE INS AND OUTS OF DESIGNATING TRUSTS AS RETIREMENT BENEFICIARIES Steve Trytten, Esq. | Anglin Flewelling Rasmussen Campbell & Trytten LLP

FINAL SPEAKERS

EVIDENTIARY AND DISCOUNT PLANNING / VALUATION ISSUES Hon. David Laro | United States Tax Court David M. Eckstein, CFA | FMV Opinions, Inc. John Prokey, Esq. | Ramsbacher Prokey LLP