Jerry A. Kasner Estate Planning Symposium

was held on Friday, September 21, 2012

The Kasner Symposium is a one-day estate planning seminar for attorneys, accountants, certified life underwriters, bank trust and investment officers, financial advisers, and other wealth planning professionals. The seminar provides attendees with most current information regarding the tax, legal, and financial issues concerning estate planning and trust and estate administration. The program includes a series of individual presentations, lunch, breakout sessions, and an afternoon reception. CLE credit hours offered.

This symposium honors Jerry A. Kasner (1933-2004), attorney and CPA, who served as Professor of Tax Law and Estate Planning at Santa Clara Law from 1961 – 1998. Professor Kasner was a nationally renowned author and speaker on estate planning topics.

2012 Kasner Symposium Presenters

CURRENT CALIFORNIA DEVELOPMENTS IN ESTATE PLANNING AND ADMINISTRATION

Robert Temmerman, Esq. | Temmerman, Cilley & Kohlmann LLP

FEDERAL TRANSFER TAX UPDATE

Stanley M. Johanson | Distinguished Teaching Professor, University of Texas at Austin

---

A1: TAX DEFERRAL, DISTRIBUTIONS & SPECIAL RULES REGARDING IRAs AND QUALIFIED PLAN BENEFITS

Michael J. Jones, CPA | Thompson Jones LLP

Steven E. Trytten, Esq. | Anglin Flewelling Rasmussen Campbell & Trytten LLP

A2: PANEL: BEST PRACTICES FOR AVOIDING AND MINIMIZING COSTS AND RISKS OF LITIGATION

Paul Barulich, Esq. | Moderator, Barulich Dugoni Law Group Inc.

Robert W. Goldman, Esq. | Goldman, Felcoski & Stone, PA

Philip J. Hayes, Esq. | First Republic Trust Company

A3: ANNUITIES IN ESTATE PLANNING

John L. Olsen, CLU, ChFC | Olsen Financial Group

B1: COMMUNITY PROPERTY, CREDITOR PROTECTION AND OTHER SPECIAL CONSIDERATIONS REGARDING IRAs AND OTHER QUALIFIED PLANNED BENEFITS

Alvin J. Golden, Esq. | Ikard Golden Jones, PC

Michael J. Jones, CPA | Thompson Jones LLP

Steven E. Trytten, Esq. | Anglin Flewelling Rasmussen Campbell & Trytten LLP

B2: RECENT DEVELOPMENTS IN CHARITABLE PLANNING

Charles H. Packer, Esq. | Moderator, Hopkins & Carley ALC

Wendy S. Goffe, Esq. | Stoel Rives LLP

B. Howard Pearson, Esq. | Stanford University

B3: PANEL: BEST PRACTICES FOR AVOIDING AND MINIMIZING COSTS AND RISKS OF LITIGATION

Paul Barulich, Esq. | Moderator, Barulich Dugoni Law Group Inc.

Robert W. Goldman, Esq. | Goldman, Felcoski & Stone, PA

Philip J. Hayes, Esq. | First Republic Trust Company

B4: ANNUITIES IN ESTATE PLANNING

John L. Olsen, CLU, ChFC | Olsen Financial Group

C1: WHAT SIGNS SHOULD THE ATTORNEY, FAMILY MEMBER, AND OTHERS LOOK FOR WHEN CONCERNED ABOUT CAPACITY (OR LACK THEREOF)?

Dr. Joel Kramer, Psy.D | UCSF Memory and Aging Center

Dr. Jennifer Merrilees, PhD. | UCSF Memory and Aging Center

Doris E. Hawks, Esq. | Of Counsel, Silicon Valley Elder Law, PC

C2: INCOME TAX CONSIDERATIONS FOR TRUSTS AND ESTATES

Justin Miller, Esq. | BNY Mellon Wealth Management

Barry Neal, CPA | Deloitte & Touche

C3: CHARITABLE PLANNING FOR NON-TRADITIONAL COUPLES

Charles H. Packer, Esq. | Moderator, Hopkins & Carley ALC

Wendy S. Goffe, Esq. | Stoel Rives LLP

B. Howard Pearson, Esq. | Stanford University

IF JERRY KASNER WERE HERE TODAY, WHAT WOULD HE SAY?

Patricia A. Cain | Moderator, Professor, Santa Clara Law

Alvin J. Golden, Esq. | Ikard Golden Jones, PC

Stanley Johanson | Distinguished Teaching Professor, University of Texas at Austin

---

SILVER SPONSORS

Northern Trust

Technology Credit Union

BRONZE SPONSORS

Barulich Dugoni Law Group, Inc.

Berger Lewis Accountancy Corporation

Berliner Cohen

Boston Private Bank & Trust Company

Carr McClellan Ingersoll Thompson & Hom

Crist, Biorn, Shepherd & Roskoph

Fiduciary Trust Company International LLC

Hopkins & Carley, A Law Corporation

Triplett Financial & Insurance Services

Union Bank

TABLE SPONSORS

Abbott, Stringham & Lynch

Atlantic Trust Private Wealth Management

Backhouse Fiduciary Services

Bernstein Global Wealth Management

Boitano, Sargent & Lilly, LLP

Burr Pilger Mayer

Carr McClellan In

Delucchi, Hawn & Co.

Ferrari Ottobani Caputo & Wunderling LLP

Financial Architects Partners

Fremont Bank

Larry LaMantia, Jr., Attorney at Law

Law Offices of David J. Arata

Lynn Stutz, Attorney at Law

New York Life Insurance Company

O'Neill Bergardo, CPAs

Pillsbury Winthrop

Ramsbacher Prokey LLP

RBC Wealth Management

Rusconi, Foster & Thomas APC

Seiler LLP

Temmerman, Cilley & Kohlmann, LLP

Thoits, Love, Hershberger, & McLean

Thompson Jones LLP

WealthPLAN

Weber and Company, Inc.

Wells Fargo Bank

Whittier Trust Company

EXHIBITORS

Bonhams

Deutsche Bank Private Wealth Management

North Point Trust Company, LLC

Pluris Valuation Advisors

South Dakota Trust Company LLC