

# NEW DIRECTIONS IN CHARITABLE GIVING

A SPEAKER SERIES FOR PROFESSIONAL ADVISORS – 2010

New Location for 2010!

DATES	TOPIC	SPEAKER(S)
Tues., April 27 (BH) Wed., April 28 (WH)	<b>Restricted Gifts to Charity – Protecting Donor Intent in Changing Times</b>	J. Patrick Whaley <i>Law Firm of Musick Peeler &amp; Garrett LLP</i>
Wed., May 26 (BH) Wed., June 2 (WH)	<b>Roth to Riches? Determining Whether Conversion Makes Sense</b>	Christopher J. Clarkson <i>Bernstein Global Wealth Management</i>
Wed., June 30 (BH) Wed., July 7 (WH)	<b>Making Irrevocable Trusts More Flexible – Powers We Wish We Had</b>	Allan B. Cutrow <i>Law firm of Mitchell, Silberberg &amp; Knupp LLP</i>
Wed., September 8 (BH) Wed., September 15 (WH)	<b>Tips re How Not to Fall into the Family Law Abyss</b>	Stacy D. Phillips <i>Law firm of Phillips, Lerner, Lauzon &amp; Jamra LLP</i>
Tues., October 12 (BH) Wed., October 20 (WH)	<b>Life Insurance and Creative Insurance Planning</b>	Jon J. Gallo <i>Law firm of Greenberg Glusker Fields Claman &amp; Machtinger LLP</i>
Wed., November 10 (BH) Wed., November 17 (WH)	<b>Clients with Diminished or Lack of Capacity – The Role of the Professional</b>	Barbara Bergstein <i>Law firm of Burgh, Balian &amp; Bergstein LLP</i>
Wed., December 1 (BH) Wed., December 8 (WH)	<b>Current Developments in Charitable Giving and Estate Planning</b>	Paul N. Frimmer <i>Law firm of Loeb &amp; Loeb LLP</i>

(BH) Beverly Hills (WH) Woodland Hills

Kosher breakfast and valet parking are compliments of The Foundation.

## WESTSIDE LOCATION:

Regent Beverly Wilshire Hotel  
9500 Wilshire Boulevard (Beverly Hills)

## VALLEY LOCATION:

Warner Center Marriott Hotel  
21850 Oxnard Street (Woodland Hills)

## ALL SESSIONS ARE 7:30 – 9:30 A.M.

Please RSVP to any or all of the *New Directions in Charitable Giving 2010* programs using the enclosed reply card or by contacting Heather Glynn at (323) 761-8704 or via email to [hglynn@jewishfoundationla.org](mailto:hglynn@jewishfoundationla.org) or via fax at (323) 761-8729. For your convenience, reminder postcards will be sent throughout the year.

There is no fee for any of the sessions.

## MCLE credit is available.

Please respond early to reserve your space!

If you have any questions, please contact Elliot B. Kristal, vice president of charitable gift planning by phone at (323) 761-8707 or by email at [ekristal@jewishfoundationla.org](mailto:ekristal@jewishfoundationla.org).

We look forward to seeing you!

## SPEAKERS FOR NEW DIRECTIONS IN CHARITABLE GIVING – 2010

### BARBARA BERGSTEIN

- Partner in the law firm of Burgh, Balian & Bergstein LLP. Specializes in elder law and estate planning.
- Consultant on the uses and drafting of special needs trusts for disabled children, minors and adults.
- Author of "The Uses of Irrevocable Special Needs Trusts in Gift and Estate Tax Planning" which appeared in *Tax Information Perspectives*, a publication of the Estate & Gift Tax Subcommittee, California Tax Bar.
- Frequent lecturer for the State Bar of California, AICPA, California CPA Education Foundation, California Continuing Education of the Bar, and the Taxation Section of the California State Bar.

### CHRISTOPHER J. CLARKSON, CFA

- Director of Bernstein's Wealth Management Group.
- Expertise in a variety of complex investment planning issues, including diversification planning for holders of concentrated stock and option portfolios, retirement planning, multigenerational wealth transfer, philanthropy, advanced asset allocation and pre-transaction planning.
- Frequent lecturer to groups of tax and legal professionals for the USC and Hawaii Tax Institutes, estate planning councils, community foundations, children's hospitals, planned giving councils, and major accounting and law firms.

### ALLAN B. CUTROW

- Partner in the Los Angeles law firm of Mitchell, Silberberg & Knupp LLP, and chair of the Trust and Estate Group.
- Certified public accountant (inactive) and a fellow of the American College of Trust and Estate Counsel.
- Has lectured for the CEB, the USC Program for Paraprofessionals, USC Probate and Trust Conference, USC Tax Institute, the Hawaii Tax Institute and the UCLA School of Law.
- Past chair of the Jewish Community Foundation's Professional Advisors Outreach Committee and past Foundation chair (1985 to 1989).

### PAUL N. FRIMMER

- Attorney with the law firm Loeb & Loeb, LLP specializing in estate planning, wills and trusts, probate litigation, art law, charitable giving and tax issues.
- Author of numerous articles in professional journals.
- Frequent lecturer at continuing legal education programs and tax institutes including the USC Tax Institute, N.Y.U. Estate Planning Institute, N.Y.U. Tax Institute, UCLA Estate Planning Institute, and programs sponsored by ALI-ABA, PLI, and California Continuing Education of the Bar.

### JON GALLO

- Partner in Gallo Consulting and chairs Greenberg Glusker's Family Wealth Group.
- Co-authored two books on raising responsible children in an affluent environment.
- Established the American Bar Association's Committee on the Psychological and Emotional Issues of Estate Planning.
- Frequent speaker on estate planning.

### STACY D. PHILLIPS

- Founding and managing partner of Phillips, Lerner, Lauzon & Jamra, LLP.
- Certified family law specialist handling many high-profile clients.
- Assisted in drafting a bill to extend the statute of limitations period, allowing victims of domestic violence to sue their abusers in civil court. Senate Bill 924 was subsequently enacted into California law (California Civil Procedure Section 340.15).
- Author of "Divorce: It's All About Control - How to Win the Emotional, Psychological and Legal Wars."
- Frequent lecturer to professional groups, bar associations, law schools and law firms on family law, mediation, ethics and business.

### J. PATRICK WHALEY

- Partner at Musick Peeler & Garrett LLP. Specializes in the field of taxation.
- Served as a trial attorney, Tax Division, United States Department of Justice, Washington, D.C. and as a special assistant United States attorney for the Northern District of California.
- Has lectured throughout the United States.
- Author of numerous articles pertaining to various tax subjects, as well as the Annual Supplements to the first edition of the CEB publication, *Advising California Nonprofit Corporations*, and executive editor to the third edition.

