

NEW ESTATE TAX LAW

Unprecedented Estate Tax Confusion Explained

(For High Net Worth Individuals)

**Attend this special event
and you will learn:**

“Clear and informative”
– Wendy Moore

“Very articulate and to the point.
Excellent education.”
– Peter Minocha

“Your presentations are fabulous”
– Behfar Bastani

- How a special election under the NEW LAW could save or make millions of dollars (for heirs of someone who died in 2010)
- The "GIFT BONANZA"* under the NEW LAW: how the wealthy can pass an extra \$8 million to their heirs ...and how to exponentially multiply that gift
- The short-term window of opportunity created by the NEW LAW and how to take advantage of it before it disappears
- How critical trust amendments can minimize tax under the NEW LAW
- One of the biggest mistakes the wealthy unknowingly and inadvertently make in their wills that result in their losing control of how their estates are distributed ... and how to avoid that trap
- The simple strategy to avoid losing your business
- How to protect your assets when your spouse (or child) remarries
- How to protect your privacy from prying eyes of creditors, ... **And much more!**

*New York Times, 12/17/10

“Estate planning is about to get easier for taxpayers—with more benefits for heirs.”
– Wall St. Journal, 12/12/10

“Few things are more important to an individual than planning his or her estate. This determines who will receive your property at your death, how much of your property will go to the government in taxes, and whether your property will pass through a probate estate...”
– Forbes, 12/10/10



Featured commentator
on television and radio

Michelle C. Lerman
ATTORNEY AT LAW

FREE PUBLIC FORUM

Thursday, January 27th, 7pm
(Refreshments)

FOUR POINTS SHERATON
1010 Northgate Drive, San Rafael

Each attendee receives
FREE private estate
planning consultation
(\$225 value)

With Radio Personality Rob Black!

- The host "Rob Black and Your Money" on KRON-TV, San Francisco, and on KDOW 1220am national radio
- Contributor "MoneyTrack" on PBS-TV, national

**For reservations call (415) 454-0455
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