



PARALEGAL ASSOCIATION OF SANTA CLARA COUNTY
Trust and Estates Section Meeting

SAVE THE DATE

TO ALL ATTORNEYS, PARALEGALS & OTHER LEGAL PROFESSIONALS:

DATE: Wednesday, May 15, 2013
TIME: Noon; Speaker 12:15 to 1:15
TOPIC: Proposition 58 Claim from Reassessment Exclusion: when, why, how, for whom
SPEAKER: Brian L. Shetler, Esq., Berliner Cohen

Most of us are aware the Claim for Reassessment Exclusion for Transfer Between Parent and Child should be filed for any parent to child transaction, although it's not always best practice under certain conditions. Brian will present a variety of scenarios in connection with Proposition 58 requirements and filing of the claim form. We may have opportunity to review matters concerning the Board of Equalization Form BOE-100-B, although that review may require a second session.

Brian Shetler's trust and estate practice is focused on tax and estate administration issues. He works with corporate fiduciaries as well as families and individuals in establishing and carrying out plans to preserve and build legacies for generations. In addition to Brian's work schedule, he belongs to or supports many charitable organizations throughout Silicon Valley. His other interests include golf, tennis, snow and water sports.

LOCATION: Moss Adams LLP (formerly Mohler Nixon & Williams)
635 Campbell Technology Parkway, Campbell, CA 95008

Map and Direction: <http://maps.yahoo.com/#mvt=m&lat=37.280312&lon=-121.941383&zoom=16&trf=0&tt=&q=635+Campbell+Technology+Pky%2C+Campbell%2C+CA+95008-5059&conf=1&start=1>
[cut and paste into your browser]

COST: PASCCO Member: \$20.00 (*\$25.00); PASCCO Student Member: \$18.00 (*\$20.00); Non-Members \$30.00
***cost of lunch increases at midnight on May 13, 2013**

RSVP: Postmark by May 10, 2013 (regular mail); by ***March 14, 2013** (electronic reservation/payment)

RESERVATION SLIP – Trust & Estates Section
May 15, 2013

REGISTER ONLINE AT www.pascco.org OR MAKE YOUR CHECK
PAYABLE TO "PASCCO" AND MAIL IT WITH THIS COMPLETED FORM TO:

PASCCO * 1275 Franklin Street * PMB 192 * Santa Clara * CA * 95050

(Please call (650) 804-7607 by May 14, 2013 to verify receipt of checks)

Name: _____ Telephone: _____ e-mail: _____

_____ PASCCO Member: \$20.00 (*\$25.00) _____ PASCCO Student Member: \$18.00 (*\$20.00)

_____ Non-Member: \$30.00 *an increase in cost applies at midnight on **May 13, 2013**

_____ *Request a vegetarian meal*

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