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Early bird registration ☐ $175 (Before 10/30) Registration ☐ $225 At Door Registration ☐ $275 Students ☐ $75 (Limited Availability)

Fees include Continental Breakfast, Lunch, Materials and Continuing Education Credits

For more information, please call 805-330-6673

For Attorneys, CPAs, Financial Planners and Insurance Agents

Reserve your space now! November 13, 2015

The Museum of Ventura County
100 E. Main Street
Ventura, CA 93002

7:30 a.m. Registration
8:00 a.m. – 3:30 p.m. Program

From Los Angeles
Take the US-101 N
Exit CALIFORNIA STREET turn RIGHT
Turn LEFT on MAIN STREET

From Santa Barbara
Take the US-101 S
Exit at MAIN STREET
TURN RIGHT ON MAIN STREET

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Estate Planning Council of Ventura County
Ventura County Bar Association

Continuing Education Credits:

CFP Board – 5.75 Hours
State Bar of California – 5.75 Hours
California Board of Accountancy – 6.9 Hours

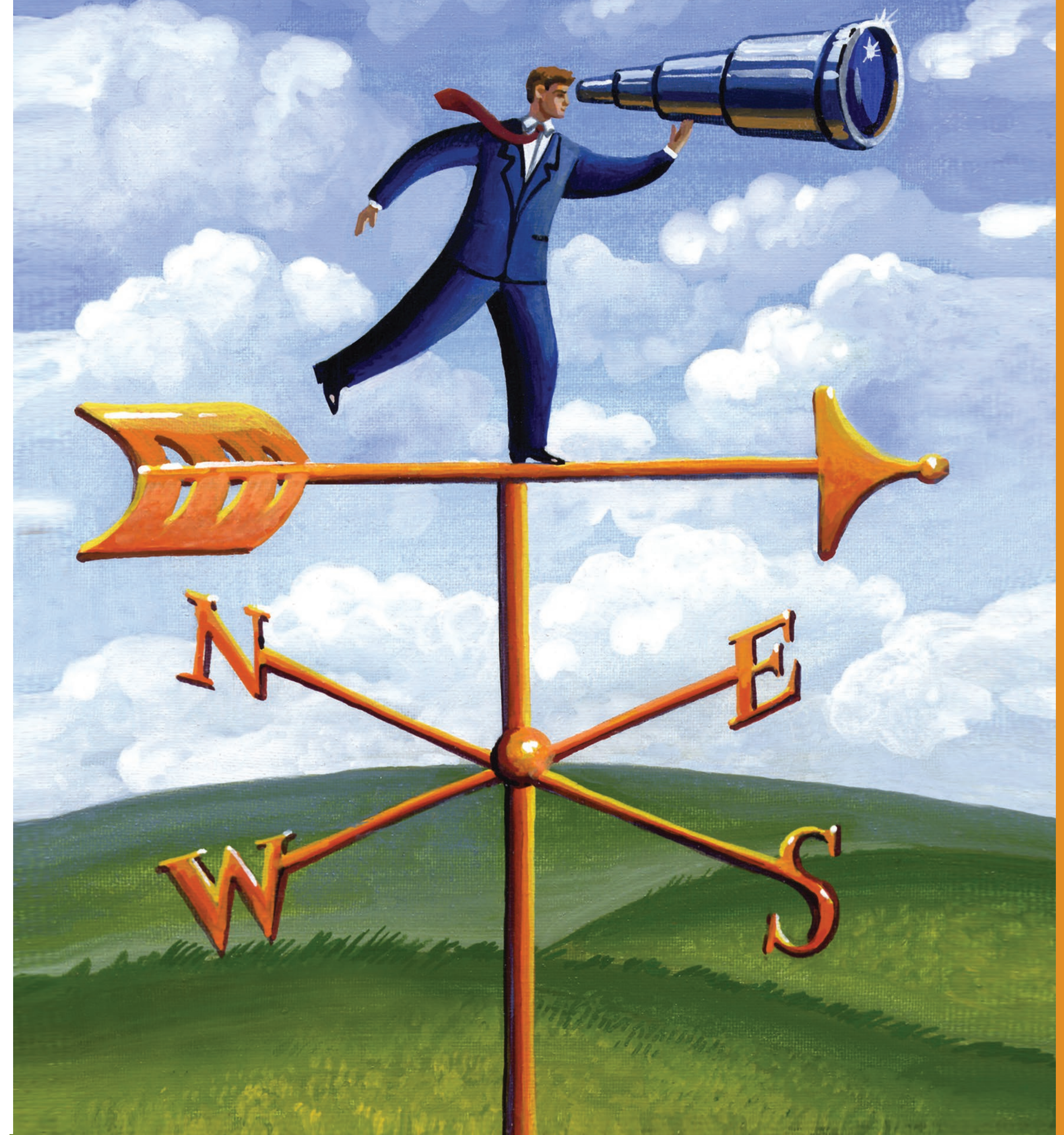
Ventura County Community Foundation
4201 Mission Oaks Blvd., Suite A
Camarillo, CA 93012

Sign up today for Early Bird Registration!

THROUGH THE LOOKING GLASS XII:

Friday, November 13, 2015

An Ongoing Reflection of Current Estate and Gift Planning Issues



Dear Colleagues,

We are excited to announce Through the Looking Glass XII! Once again the twelfth symposium will explore the latest trends in estate planning and charitable giving. As in the past, this year's symposium will offer the quality continuing education, networking time with your colleagues and dynamic speakers that you have come to expect.

This year's committee has done its best to listen to your past feedback and put together a schedule of prominent professionals to present areas of expertise including asset protection, estate buyback strategies, what you need to know about divorce as well as estate and tax issues, financial planning and other relevant topics. We have brought together a phenomenal faculty of speakers to address timely and interesting challenges that we all face in the year ahead.

Plan on joining us on Friday, November 13, 2015 at the Museum of Ventura County, 100 East Main Street, for this year's Annual "Through the Looking Glass Symposium."

The cost is $175 before 10/30/15. $225 after, and $275 at the door. A limited number of spaces are reserved for students at the reduced rate of $75. For your convenience you can register on-line at www.vccf.org/lookingglass.shtml or return the attached registration form.

Reserve your spot today!

California Lutheran University · Channel Islands California State University · Museum of Ventura County · Ventura County Community Foundation

7:30 a.m. Registration/Continental Breakfast

8:00 a.m. Welcome & Introductions
Breakfast Sponsor – Wells Fargo

8:15 a.m. *John Ambrecht, MBA, JD, LLM*
Senior Partner Ambrecht & Associates

Asset Protection Trusts: An Important Ingredient in the Estate Planning Process

John Ambrecht

DESCRIPTION: Can, or perhaps more importantly, should estate planning professionals counsel clients to undertake steps to protect their assets and those of their beneficiaries from future potential creditors through the use of various kinds of trust structures? If so, what kind of trusts can be used to protect those assets?

It is the goal of this session to provide the planner with a quick overview of a few of the more important kinds of trusts that can ethically and legally be used to help protect the family assets for the current and subsequent generations.

John W. Ambrecht is an attorney specializing in complex trust and estate law. He is founder and owner of Ambrecht & Associates in Montecito, California, which specializes in asset protection, resolving estate and gift tax controversies matters, and integrating sophisticated estate and tax minimization strategies with inter-generational family dynamics.

He is a fellow of the American Council of Trust and Estate Counsel (ACTEC) and a member of its Asset Protection and Business Planning Committees (BPC). He was recently chair of the BPC Family Dynamics Sub-Committee. He was selected to appear in Worth's magazine's exclusive annual list of 100 most exceptional attorneys in the United States for 2009.

Mr. Ambrecht holds an MBA from UCLA, a JD from Loyola of Los Angeles, and an LLM in tax law from New York University.

9:15 a.m. *Michel Zelnick, CPAin, JD, MFT*
PresidentThe Zelnick Group

Gender and the Brain: Do men and women think differently?

This activity has been approved for Minimum Continuing Legal Education credit by the State Bar of California in the amount of 1 hour of ELIMINATION OF BIAS credit. VCBA certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing Minimum Continuing Legal Education.

DESCRIPTION: Does gender affect communication and collaborative problem solving? Well, it turns out that men and women's brains are not the same. They process information and emotions quite differently. The speaker will be discussing some of the neurobiological factors that impact the interactions between men and women and, more importantly, how an understanding of these factors can result in more effective communication and collaboration.

Michel Zelnick is a Business Therapist | Partnership Coach who uses his experience as a former "Big 4" CPA, practicing attorney, and clinical psychotherapist to get business partners and family business leaders on the same page when they are in conflict with one another or at a serious impasse. He focuses on getting business owners and families to constructively engage with one another and to achieve alignment where negative emotions and psychological issues have impacted their ability to make sound economic decisions.

Michel Zelnick

Michel has advised public and private companies, partnerships, and boards for over forty years, integrating business and psychological approaches to complex business and family problems. He brings a deeply pragmatic perspective to the psychology of conflict and how to harness conflict during important transitions.

Michel has a Masters in Business from McGill University, as well as a Masters in Marriage and Family Therapy and a JD from the University of San Diego. Michel regularly presents on how to constructively deal with the common psychological barriers that interfere with business and partnership success, including those that impact estate and succession planning.

10:15 a.m. Break

10:30 a.m. *Andrew Katzenstein*
Partner, Personal Planning & Fiduciary Litigation Proskauer

Estate Buyback Strategies: How to Avoid Losing the Basis Step-Up at Death as a Result of Estate Planning Done During Life

Andrew Katzenstein

DESCRIPTION: When estate tax rates dropped to 40% and capital gains rates rose (including Federal, California and Obamacare taxes) to an effective 35%, the estate tax savings resulting from moving assets out of a decedent's estate are almost entirely offset by the loss of the basis step-up at death. Sales to IDITs and GRAT planning are therefore made much less effective. This discussion will cover how buying back the assets back before death can allow for the benefits of the basis step-up to be preserved while still accomplishing estate tax savings, as well as the use of "total return swaps" to accomplish this benefit even if the grantor dies before a buy-back could otherwise have occurred.

Andrew M. Katzenstein is a Partner in the Personal Planning Department in the Los Angeles office of Proskauer Rose LLP where he assists high net worth individuals, companies and charitable organizations with all aspects of tax and estate planning. He focuses his practice on tax planning matters, which include estate, gift and generation-skipping tax planning, as well as income tax of trust planning, probate and trust administration matters, resolving disputes between fiduciaries and beneficiaries, and charitable planning.

Andy graduated from the University of Michigan magna cum laude with a Bachelor's degree in Political Science in 1979 and from the University of Michigan Law School in 1982 with high honors. He received his LL.M in Taxation from the University of San Diego School of Law in 1990.

Andy has served as Chair of the Beverly Hills Bar Association's Probate and Trust Law Section, and the Los Angeles County Bar Association's Estate and Gift Tax Committee. He also taught Estate and Gift Tax at UCLA Law School for more than 15 years. Andy currently teaches the Estate and Gift Tax course at USC Gould School of Law and is a member of the American College of Trust and Estate Counsel.

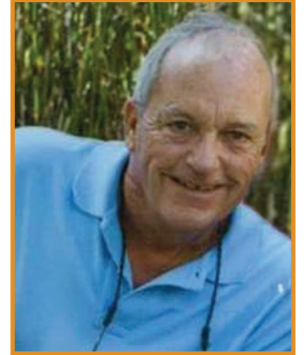
11:30 a.m. Luncheon Sponsor – Union Bank

12:00 p.m. *Harry Barth, Esq.*
Senior & Managing Partner BarthCalderon LLP

Barry Harlan, Certified Family Law Specialist Chair of the Family Law Practice Group Lewitt, Hackman, Shapiro, Marshall & Harlan

Evelyn Zohlen, MBA, MS, CFP®
Founder and President Inspired Financial

The Honorable John R. Smiley – Panel Moderator
Superior Court of California – County of Ventura



Your client's getting divorced? Don't be blindsided! A Panel Discussion for Estate Planning Professionals

DESCRIPTION: Even the best estate plans can be turned upside down by a divorce. Learn about the most common legal and financial consequences of divorce, and how to help your estate planning clients avoid these challenges. Judge Smiley and our panelists will share their wisdom and experience to help you and your clients successfully navigate the particular estate planning pitfalls that come with legal separation. This session will have plenty of time for questions from the audience, so come prepared to ask your most pressing divorce and estate planning questions.

Harry Barth is the founding member and the Senior Partner in the firm BarthCalderon LLP. His practice is devoted to business law, contract law, real estate law, and estate planning matters, focusing primarily on the application of these areas in asset protection.

With more than 40 years of experience, Harry serves as the Managing Partner of BarthCalderon LLP and the Managing Member of Barth Financial Advisors, LLC. He is a nationally renowned speaker on Asset Protection Planning, Estate Planning, Business Succession Planning, and Planned Charitable Giving.

Barry T. Harlan is a Los Angeles divorce attorney and a Certified Family Law Specialist designated by the State Bar of California's Board of Legal Specialization. He represents high net worth individuals in complex divorce matters where the earnings and property of the parties are significant.

Barry is admitted to practice before the U.S Supreme Court and all of the Superior Courts in the State of California. This California divorce attorney currently serves the Los Angeles Superior Court as a Judge Pro Tem and a Family Law Mediator.

Hon. Jack Smiley has served as a trial judge since 1986 and was Supervising Family Law Judge of the Ventura Superior Court from 1998-2004 and from 2007-2013. He graduated from Princeton University with a Bachelor's degree in English and received his Juris Doctor Southwestern University School of Law.

Evelyn M. Zohlen is the founder of Inspired Financial, LLC, a fee-only wealth management practice that specializes in serving women in transition in southern California. She received her Bachelor's degree from the University of Texas, her Master of Science from the Joint Military Intelligence College, and her Master of Business Administration from Villanova University.

Evelyn is a Certified Financial Planner™ (CFP®) and serves on the Board of Directors of the Financial Planning Association. She is on the Advisory Board for the Center for Investments and Wealth Management at UC Irvine and has served in a variety of community leadership roles including the Board of Directors for WomanSage.

1:00 p.m. Break Sponsor – Rabobank

1:15 p.m. *Edward J. McCaffery, Esq. & Alan T. Yoshitake, Esq.*
Seyfarth Shaw LLP, Los Angeles.

Recent Developments Affecting Estate Planning

Edward J. McCaffery

DESCRIPTION: Mr. McCaffery and Mr. Yoshitake will discuss the practical applications for current planning and drafting. They will also discuss planning opportunities and pitfalls going forward. As always, the "Dynamic Duo" will also shed some light on current developments relevant to practitioners and their clients. As of press time, our two featured speakers may be joined by a third panelist bearing another perspective on current trust and estate planning practices.

Edward McCaffery practices in the area of trusts and estates, taxation and intellectual property. He was the former dean of the USC law school and remains on their faculty. He currently teaches at Caltech. McCaffery earned his JD from Harvard Law School and is a member of the American Law Institute and National Tax Association.

Alan T. Yoshitake

Alan Yoshitake's practice focuses on tax issues related to estate and financial planning and to charitable giving for individuals and privately owned businesses. His professional affiliations include the American, Los Angeles, Beverly Hills and Hawaii Bar Associations, the U.S. Supreme Court, and member of the USC Tax Planning Committee.

Edward McCaffery and Alan Yoshitake are partners in the law firm of Seyfarth Shaw LLP, Los Angeles.

2:45 p.m Closing Remarks

THROUGH THE LOOKING GLASS XII
November 13, 2015