

## **"Creative Uses of Charitable Trusts" to be held at Westgate Hotel; sponsored by Chancellor's Associates**

**May 3, 1979**

A financial planning symposium for professionals on the "Creative Uses of Charitable Trusts" will be held from 1 to 5 p.m. Thursday, May 17, in the Versailles Room of the Westgate Hotel.

The symposium is sponsored by The Chancellor's Associates of the University of California, San Diego. It is designed for attorneys, trust officers, certified public accountants and other professionals who want to become more familiar with the charitable trust options available in providing maximum financial security for families and obtaining maximum charitable deduction benefits.

The symposium will be taught by Malcolm Moore of the law firm of Davis, Wright, Todd, Riese and Jones in Seattle, Washington, and Robert E. Falb of the firm of Silverstein & Mullins in Washington, D. C.

Attendance at the symposium is limited to 150 people and no firm may send more than three people. The fee is \$35 and registration will be accepted on a first-come, first-served basis through Monday, May 14. Further information and registration forms are available through the University of California, San Diego at 452-3138.

Phil Martin, senior vice president of California First Bank, will open the symposium with an introductory statement. Moore will speak at 1:15 p.m. on "Charitable Remainder Unitrusts and Annuity Trusts Ten Years after Birth." Falb will speak at 2:30 p.m. on "The Charitable Lead Trust." A question and discussion period is scheduled at 3:30 p.m.

Moore is a graduate of Princeton University and Harvard Law School and is a member of the New York and Washington Bars. He is a member of the board of regents of the American College of Probate Counsel and a member of the council of the American Bar Association section of real property, and probate and trust law. He is a visiting adjunct professor at the University of Miami School of Law and a member of the joint editorial board for the Uniform Probate Code.

Falb is a graduate of Brown University and Harvard Law School. He was admitted to the District of Columbia Bar in 1968. He is a member of the section on taxation and section of real property, and probate and trust law of the Washington, D. C. Estate Planning Council. Falb is editor of and writes extensively for "Tax Management." He specializes in federal taxation with emphasis on business and estate planning and his practice includes counsel on charitable planning, the use of foundations and split interest trusts.

For further information contact: Paul West, 452-3120

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