With tax season in full swing, it's an excellent time to consider if your estate plan is up to date.

Are there changes you've needed or wanted to make that you just haven't gotten around to? It's a great time to finally update your plan and give yourself the peace of mind knowing that your current wishes are now in place.

**Attorney Deidre Von Rock** will give an overview describing the purpose and benefits of understanding and implementing a trust based Estate Plan. Such a plan is an integral part of a financial strategy and is an absolute necessity for arranging the continued wellbeing of you and your loved ones. This is the first step to learn about reaching your goals for the future.

**SF State’s Director of Planned Giving, Steve Kelton,** will discuss multiple ways to give to charities through an estate plan.

**Full bios on reverse.**

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**Date:** Wednesday, March 4

**Time:** 12:30 to 2:00 pm

**SF State's Downtown Campus**

835 Market Street, Room 626

**Directions:** Enter from the sidewalk into 835 Market under the purple SF State banner.

*Bring your own lunch. No RSVP required. Free and open to non-members. Bring a friend!*
March 4, 2020, 12:30 – 2:00

ESTATE PLANNING:
SF State’s Planned Giving
835 Market Street, Room 626

Deidre Von Rock, Von Rock Law - Deidre founded Von Rock Law to offer comprehensive services to privately held businesses, families and individuals to offer just such a community. With over 20 years of experience in the areas of business organization, transactions, real estate and estate planning matters, Deidre is prepared to not only offer the highest caliber of legal counsel, but to provide a team of professionals to guide and manage your affairs. By establishing a network of attorneys in a variety of practice areas and working alongside advisors in the financial, taxation, insurance, real estate and personal care arenas, Von Rock Law is equipped to offer comprehensive resources for your business and personal needs.

Deidre graduated from San Diego State University with a B.A. in Political Science and earned her Juris Doctorate from New England Law: Boston. A West Coast native, Deidre has resided in San Francisco since 1996. She is a long-time volunteer with the St. Brendan parish and School communities; she is active in the community of Archbishop Riordan High School; she has been the President of the West Portal Merchants Association since 2015; she is a member of the BNI Stars chapter and ProVisors SF VII chapter, a board member of the SDSU Bay Area Regional Council, and is otherwise always looking for ways to give back to the community, especially to sister breast cancer survivors.

Steve Kelton, San Francisco State University - After a career in the for-profit world working on Wall Street, helping people to plan their estates, and as a financial advisor, Steve made the leap to nonprofit work in the field of planned giving in 2001. He was recruited to San Francisco to join the national office of Sierra Club where he went on to be the National Director of Major Gifts and Planned Gifts, managing Directors of Development in big cities across the country. He moved on to San Jose State University for six years during which they launched their first-ever comprehensive campaign and joined SF State in November 2014 for their first comprehensive campaign. Steve enjoys working with donors to match their ideas for giving with planned giving vehicles that help them achieve their vision.

Steve graduated from Emerson College in Boston, MA with a concentration on Mass Communications. Steve has held most certifications in the financial planning arena and that has helped him tremendously in talking with donors to understand their personal situations and tailor giving vehicle options that fit their goals.

Find more lectures, groups, events, and classes at olli@sfsu.edu | 415.817.4243