

**MINUTES OF THE ANNUAL CONFERENCE  
FUNERAL CONSUMERS ALLIANCE OF SAN MATEO AND SANTA CLARA COUNTIES**

Sunday, April 3, 2011  
Los Altos Public Library, 13 San Antonio Rd., Los Altos

Over 60 people were present at the annual conference. Agendas, Annual Reports, and Feedback Forms were placed on each seat. Informational brochures were on tables for people to pick up. Refreshments were available at the back of the room.

Deborah Meckler, President, welcomed members and guests and introduced current board members. She explained the functions of the FCA-FEF organization, stressing its role as a consumer watchdog, a provider of information including a speaker's bureau, and a way for individuals to keep up with death care issues. The website [www.fcapeninsula.org](http://www.fcapeninsula.org) provides a great deal of useful information for both members and the general public.

Deborah reminded members of changes coming in FCA record-keeping procedures as we move from file cabinets to computerized information. Members wanting copies of their paper files can send a stamped, self-addressed business-sized envelope to the office before June 1, 2011.

Minutes from the previous meeting were approved, noting a correction to the spelling to Jim Reese's name. (He's not the peanut butter cup). The annual budget, and the election of three new board members were approved. New members elected for three year terms include Mila Popov, Byron Chan, and Ann Nola.

A Certificate of Recognition was presented to Harry Anisgard, former board member and long time volunteer for answering the night/weekend phone for people urgently needing information outside of office hours.

A Certificate of Recognition was presented to retiring board member Marjorie Bridges who has long served FCA, starting as Office Manager and continuing through 16 years, taking many offices and responsibilities.

Door prizes were presented to lucky ticket holders including books, flowers, and a complimentary FCA membership to use or to give to family or friend.

Board member Bob Marder introduced Speaker Colleen McAvoy, Estate Planning Specialist, Partner in the law firm of McGlashan & Sarrail, San Mateo. Colleen introduced her associated Nancy Rossi, Esq. and Cynthia Lemus, Esq.

Colleen covered the convoluted history of Estate and Gift taxes and described the current situation under the Unified Gift and Estate Tax exemptions, which provide a 5 million exemption when you die, a 5 million lifetime gift tax exemption, and a step up to current value of your assets when you die. This law expires in 2012.

Cynthia spoke on the issue of who controls disposition of the body, rules determined by the Health and Safety Code and how to insure that your wishes are carried out. She provided a helpful form to list details. Nancy spoke about planning how to handle your digital assets, recommending creating a comprehensive inventory of software, websites, accounts AND passwords to be included with your records since many people now do not keep paper copies.

Speakers then met in small groups with individuals having further questions.

Respectfully submitted,  
Carolyn Bechthold