



January 2016

Happy Holidays! I hope that this letter finds you and yours all happy and healthy and looking forward to a very prosperous new year.

One of the things that I'm looking forward to in the new year is our meeting on January 7 at the Crow Canyon Country Club. We're very lucky to have Kyle Martin, Supervisory Attorney at the Internal Revenue Service, coming to present on recent developments in Estate and Gift Tax. It's always great to know what the IRS is up to and Kyle is usually a wealth of information. This is sure to be an interesting and informative presentation and is not to be missed!

Thinking along those lines, have you been able to cross off all those hard to buy for Estate Planning professionals on your list? How about inviting them to join you at this presentation? What a great way to impress them with how proactive you are keeping up with all the most recent developments in the Estate Planning world! Well, on second thought, maybe it's not a great gift, but I'm sure they'd still love to come and would really appreciate the invitation. Just an idea...

Finally, I'd like to send a special thanks out to all the members of my board. This time of year I can't help but reflect on all I have to be grateful for and I really appreciate the energy, enthusiasm, and

commitment to making the Tri Valley Estate Planning Council this group has brought to the table. It has truly been my pleasure to serve with you and your efforts are very much appreciated!

All the best and I look forward to seeing you all on January 7.

Sincerely,

Ken Perine, CFP®

2015-2016 President Tri-Valley Estate Planning Council

January 7th, 2016

[Crow Canyon Country Club](#)

711 Silver Lake Drive
Danville, CA, 94526

5:30 P.M. Cocktails & Networking

7:00 P.M. Program

General Attendee:

\$75 per person (member or guest)

*Reservations and cancellations must be received
by Monday, Jan 4th at 2:00 p.m.
to be assured of a reservation.*

Please send your check today!

or

Pay with a credit card online

<https://www.123signup.com/register?id=pbsfx>

Questions? Call Krysta at 925.778.1165