



May 2016

Greetings all!

For all of our friends involved in tax preparation, congratulations! You made it. Another tax season in the books.

Our next meeting will be Thursday May 5 and I'm very much looking forward to our presentation. This month we're fortunate to have Gregory Wilcox come and talk to us about recent legal developments that have changed the pros and cons of using special needs trusts. For our clients taking care of loved ones with special needs there are few topics more important. This should be a great opportunity for all of us to update our knowledge on the different strategies out there so we can continue to help our clients with these difficult decisions.

We are also going to be taking care of some business. At this meeting we plan to vote on some amendments to our bylaws and we'll also be presenting our slate of candidates for the 2016-2017 Board of Directors. I know your incoming President Denise Chambliss has been working hard on getting all of the board positions filled, and I'm excited to work with them for one more year to continue to provide our members with great education and networking opportunities.

Finally, we're also going to be having some fun. Our wine sponsor this month is the

Tri Valley Conservancy, a local charitable organization whose mission it is to preserve agricultural land and open space here in the Tri Valley. Every year they host a wine competition to identify the best of the best from our local wineries and it is my understanding that they're going to be pouring some of the winners for us at our meeting. A big thanks to TVC for their generosity and if you'd like to check out some of these great wines, you definitely don't want to miss this meeting.

Sincerely,

Ken Perine, CFP®

**2015-2016 President**

**Tri-Valley Estate Planning Council**

**May 5th, 2016**

[Marriott Pleasanton](#)

11950 Dublin Canyon Road  
Pleasanton, CA 94588

6:00 P.M. Wine and Registration

6:30 P.M. Dinner and Speaker

**Member Cost: \$50.00 dinner (preregister)**

**\$55.00 (call in after 2pm on May 3)**

**Guest Cost: \$55.00 dinner**

**\$60.00 (call in after 2pm on May 3)**

*Reservations and cancellations must be received  
by Tuesday, May 3rd 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=ngdyp>

Questions? Call Krysta at 925.778.1165