



May 2017

As I write this, it is shocking to realize just how close we are to the end of our current term and the changing of our Board of Directors this summer. Looking back over our activities, our Council can be quite proud. We have increased attendance at our monthly meetings, which in turn strengthens the connections between our members and creates referral and networking opportunities as well as expanding our collective knowledge base, and collaboration in the complex world of estate planning and wealth management. Bottom line, I am pleased to report that our Tri-Valley Estate Planning Council is strong, in a growth mode, and well poised to transition to new leadership.

**SAVE THE DATE – JUNE 1, 2017 SUMMER SOCIAL.** We are holding our summer social and networking mixer at Pairing Cellars, located at 310 Main Street, in downtown Pleasanton. Locally owned, Pairing Cellars is a relatively new business in downtown Pleasanton, offering a good selection of wines, beers, beverages, and tasty small plates and appetizers.

We will have space inside the establishment with high tables, to meet and greet, with a brief recognition of the outgoing Board and the incoming Board. Members interested in joining the 2017-2018 Board are encouraged to contact the incoming President **Robert Jacobs**.

**Status of Council Membership Recruitment.** As I have previously shared, one of my personal goals for our Estate Planning Council is an increase in our membership. I am pleased to report that over the past term, our membership coordinator **Frankie Ross** has been busy vetting potential members and passing favorable recommendations to the Board. We have added new members and increased the diversity of professions within our ranks.

However our current term is not finished quite yet. I encourage each of you to invite interested guests to our meetings. Inviting potential members is a win-win, as guesting is good networking for you and offers an opportunity for your guests to expand their profile in the Tri-Valley area among estate planning professionals.

**Details of our May 4, 2017 Presentation.** For our next general meeting, it gives me great pleasure to announce that our speaker will be Kevin Urbatsch of The Urbatsch Law Firm, P.C., with his presentation on “Planning for

Persons with Disabilities: Recent Developments”. Kevin Urbatsch is a Certified Specialist in Estate Planning, Trust, and Probate Law by the California State Bar Board of Legal Specialization. Kevin is a fellow of the American College of Trust and Estate Counsel (ACTEC). He serves as National Director of the Academy of Special Needs Planners (ASNP), a national organization of special needs planning professionals. Kevin also serves as Editor-in-Chief of the NAELA Journal. He is a frequent speaker and author and the Second Edition of his latest book was recently published titled “Administrating the California Special Needs Trust.”

I look forward to seeing you at our next meeting on the increasingly common Special Needs Trust.

Sincerely,  
**Denise E. Chambliss, Esq.**  
**2016-2017 President**  
**Tri-Valley Estate Planning Council**

**May 4, 2017**

[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 2)**  
**Guest Cost: \$55.00 dinner**  
**\$60.00 (call in after 2pm on May 2)**

*Reservations and cancellations must be received  
by Tuesday, May 2nd 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=nrpd>  
Questions? Call Krysta at 925.778.1165