



October 2015

We're about a week away from our next meeting and it's one I'm really looking forward to. If you haven't heard Mary Kay Foss present before, I think you're in for a treat!

Her topic, "Should You Trust a Trust as your Retirement Plan Beneficiary" is I believe, a definite source of confusion for many of our clients. Naming the primary beneficiary, often times the spouse, is pretty easy, but what about those contingency beneficiaries? Mary Kay will help us weigh the pros and cons of naming your trust as a beneficiary, so we can help our clients make the best choices for them.

And boy does she know what she's talking about! She's a past president of both the Estate Planning Council of Diablo Valley and the Estate Planning Council of the East Bay. She's a past chair of both the Estate Planning Committee and the Committee on Taxation of the California Society of Certified Public Accountants. Currently she chairs the AICPA Trust, Estate and Gift Tax Technical Resource Panel. I'm not sure where she finds the time, but evidently in her spare time she also teaches Retirement Distributions: Planning Options and Top 10 things Financial Planners Need to Know about Estate Planning for the California CPA Education Foundation. If you've got questions, Mary Kay is a fantastic resource to find the answers and I encourage you to not miss this presentation.

Speaking of finding answers, your fellow members represent a tremendous wealth of

knowledge, and as a member, you have an easy way to tap into that. For those of you that use LinkedIn, be sure to check out our LinkedIn group. This is a great place to post questions you have, timely articles on hot topics, and maybe even some of your own thought leadership. I encourage you to check it out and join the conversation!

Sincerely,

Ken Perine, CFP®

2015-2016 President Tri-Valley Estate Planning Council

October 1st, 2015

[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 Sep 29)

Guest Cost: \$55.00 dinner

\$60.00 (call in after 2pm on Sep 29)

Reservations and cancellations must be received by Tuesday, Sep 29th 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=pzbbt>

Questions? Call Krysta at 925.778.1165