



October 2016

Welcome to Fall!!!

October 2016 Program. We are pleased to present an "Overview of Proposed Sec 2704 Regulations" by Keith Schiller, Esq. of the Schiller Law Group. The long-awaited proposed regulations under section 2704 of the Internal Revenue Code, released on August 2, 2016, would make sweeping and very significant changes to the valuation of interests in many family-controlled entities for estate, gift, and generation-skipping transfer tax purposes.

Membership Recruitment. One of my personal goals for our council during my administration is to increase our membership to at least 100 members. As most of you may have learned, this figure is a good size for groups like ours, as 100 members can provide a great variety of resources – such as networking among our membership as well as being a referral resource for our members. I ask each of our members to be mindful of potential members and invite them to guest at one of our meetings. Inviting potential new members is a win-win, it is good networking for you and offers an opportunity for your guests to expand their profile in the Tri-Valley area among professionals servicing the public's estate planning needs in a wide variety of services. If you have any questions about our membership recruitment, Frankie Ross, of The Principal Financial Group, is our membership coordinator.

National Association of Estate Planners & Councils. To update everyone on our recent application to be considered for the Leonard H. Neiman and Walter Lee Davis, Jr. Council of Excellence Award, I have received notice from our National Association that the competition was again very keen and our council scored competitively. Yet, there were other councils that ranked higher overall. Overall, I see our council being in consideration for this award for the 2017 call. As a reminder, don't forget the resources available from our National Association at www.naepc.org.

All the best and I look forward to seeing you at our next meeting on October 6.

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

October 6th, 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 October 4)

Guest Cost: \$55.00 dinner

\$60.00 (call in after 2pm on October 4)

*Reservations and cancellations must be received
by Tuesday, October 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=nmsxy>

Questions? Call Krysta at 925.778.1165