



## OCTOBER 2013

**Thank you** to all who attended September's meeting. The overall reviews were positive leading me to believe that those who attended enjoyed Sil Coccia's presentation. He has made his presentation available to us and Krysta will be sending it out to everyone that attended. Thank you for your honest feedback. It is the only way we can keep giving you presentations that are of interest to you and of the high caliber you expect. Your comments, feedback, and suggestions are always welcome.

This month's subject is one that is near and dear to my heart – **Work Life Balance**. I personally struggle with trying to keep all the “balls of life” in the air having two teenage children at home, a 94-year old father to keep tabs on, and a full-time job where I am an employee. I've also been told that somewhere in there is supposed to be time for myself and my husband. I'm pretty sure most can relate to this to one degree or another. So with all that said I am excited to hear our October speaker, Alan L. Olsen, talk to us on the topic of creating balance in life.

Alan knows well that balancing a full time job, serving in the community and finding time to spend at home can be difficult. As business owner of a highly successful company, Alan L. Olsen, CPA, MBA (Tax) understands the need for putting a plan in place to create balance in life. Olsen will share his unique perspective and an effective process he has used in balancing life's many priorities. While managing a nationally recognized CPA firm, serving in various community organizations and raising a family of seven children, Olsen ventured out to start his own radio show, Alan Olsen's American Dreams. His weekly show has become successful in educating listeners on how to make business thrive while finding balance in life.

**Please join us on Thursday, October 10<sup>th</sup> at 6:00** to hear about creating more balance in your life, socialize and network with your fellow estate planning professionals, enjoy a nice dinner, and you might even win the drawing for a bottle of wine. What more could you ask for?

**Membership/Recruitment** – Do you know a high caliber professional that deals with some aspect of estate planning as part of their professional life and they are not currently attending our meetings? Please encourage them to attend a meeting as a guest and submit an application for membership. The board reviews applications every month and we love to approve as many new members as possible.

Applications are available on our website [www.TVEPC.org](http://www.TVEPC.org).

**Directory Advertisements** – Time is running out to submit your application to buy an ad in our annual directory. Directory Sponsorship is for Members Only at the cost of \$250 for a ½ page ad. Your advertisement will be proudly displayed in the hard copy roster, as well as on the TVEPC website, with a link to your own website. These advertisements need to be paid for and sent to TriValleyEPC@gmail.com by October 15, 2013 <https://www.123signup.com/event?id=bkkfd>.

**Meeting Sponsors** – There are still a few months available for meeting sponsorship. Our sponsors help to offset the cost of our meetings so we can keep the price of the dinners reasonable. Meeting sponsorships cost \$250.00. Meeting Sponsorship is for Members and their respective companies. As a Meeting Sponsor, your company logo will be proudly posted on the online newsletter, with your contact information. You can put company materials on each seat at the meeting, and you provided a complimentary dinner pass along with 5 minutes to present from the podium. I hope to see you on October 10<sup>th</sup>!

**-Mary Ballin, President 2013-2014**

**October 10th, 2013**

[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: \$40.00 dinner (preregister)  
\$45.00 (call in after 2pm on Sep 10)  
Guest Cost: \$45.00 dinner**

*Reservations and cancellations must be received  
by Tuesday, September 10 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/event?id=dxcb>

Questions? Call Krysta at 925.935.9691