



President's Message

It gives me great pleasure to welcome all of our TVEPC members back for the 2012-2013 year. I am truly honored to be your president and with the help of the fantastic board you have elected I believe this will be a great year for our organization.

One of the initiatives our board has taken up is to improve our outreach to members and make registering for events and paying dues easier than ever. In addition to the traditional ways we contact you through the newsletter and email we have also set up a LinkedIn page for the council. It will now also be possible to pay for dues and register for meetings through 123Signup.com. If you have not already done so, be sure to pay your 2012-2013 membership dues to reserve your spot in our directory. Our first meeting of the year is just a couple of weeks away so register soon to reserve your place!

This year we will be bringing you a great line-up of top-notch speakers covering all the disciplines of estate planning. I think we can all agree that with market volatility, an international debt crisis, a presidential election and continued political uncertainty in the arena of tax law it promises to be a challenging time for us professionals in the estate planning world. What a great opportunity we have in our council to meet and network with fellow professionals and enjoy quality presentations to help navigate through this environment. I look forward to seeing all of you September 6th!

Steve Polaski
2012-2013 President

This meeting is sponsored by:

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“Crummy and Defective Means . . . Fantastic!” (Suggestions on How to Create Flawless ILITs)

Irrevocable Life Insurance Trusts are an important tool in the estate planning professional's toolbox potentially allowing large transfers of wealth tax-free from one generation to the next. However like any legal document it needs to be done correctly to function as intended.

Please join us for a presentation on ILITs by a local expert **Robert E. Burton, LLB, CLU, ChFC, AEP**. Learn what separates the good, the bad and the ugly in these trusts and how you can help your clients ensure their ILITs will work as designed.

Mr. Burton is a graduate of Yale University and Columbia Law School and has had a long and distinguished career in the life insurance industry. An award-winning author and a prolific speaker, he has lectured before numerous estate planning councils and other industry groups and at several estate planning symposiums. A member of three San Francisco Bay Area estate planning councils, he is a former President of the San Francisco EPC and is a past Board member of the National Association of Estate Planners & Councils. He is also very active in community affairs and is a former two-term Mayor of Mill Valley, a suburb of San Francisco and currently still serves on three appointed public boards in Marin County.

Thursday, September 6, 2012

Marriott Pleasanton

For Directions click [HERE](#)

6:00 PM Wine and Registration

6:30 PM Dinner and Speaker

\$40 Pre-Registration

\$45 - Call in after 1:30 PM on Sept 4th

Send a check to the TVEPC office today

TVEPC – 781 McKean Place –

Concord, CA 94518

or by credit card click below

<https://www.123signup.com/calendar?org=tvepc>