



# September 2014

In a couple of weeks, the TVEPC kicks-off another year, and it's my pleasure to welcome all our members back for an exciting program line-up. Your Board of Directors has been working judiciously to compile an exciting program line-up, which will commence with the always informative Kyle C. Martin, a Supervisory Estate Tax Attorney with the Internal Revenue Service. Kyle will be covering a variety of topics including the status of the Estate and Gift Tax law in 2014 and beyond, Extensions of Time to File and Pay, paying Estate Tax in installments under IRC Section 6166, the importance of a good appraisal, adequate disclosure on Gift Tax Returns, recent changes in the requirements for cases going to Appeals from Exam, and helpful practice tips for preparing and filing Estate and Gift Tax Returns.

Hopefully all of you have already renewed your membership with TVEPC and signed up for the September meeting, but just in case you haven't, here's the link: <http://www.123signup.com/register?id=dxcsv>.

Once again we will be offering a variety of marketing opportunities, and we have expanded our directory advertising to include a quarter page ad for only \$150, but space is limited. We will continue to offer half-page ads for \$250, but due to the limited space, I suggest you move quickly to secure this opportunity. In addition, we will continue to offer meeting sponsorships for \$300, which includes a branded TVEPC newsletter with your logo, the opportunity to provide all members with your company information, a complimentary dinner pass, and a 5 minute presentation to tell our members more about you and your company. If you are interested in either the directory advertisement or meeting sponsorships, then please follow this link: <http://www.tvepc.org/sponsorship.html>.

As many of you know, TVEPC has a LinkedIn group which has had some exciting discussions over the past year, and if you are haven't joined yet, the please go online and join the group by following this link <https://www.linkedin.com/groups/TriValley-Estate-Planning-Council-4561590>

Lastly, I would like to thank all our members that volunteer their time to the betterment of TVEPC, especially Mary Ballin for her service as President last year and last year's Board of Directors for their services.

Thank you for the opportunity to serve as President, and I look forward to seeing everyone at the September meeting.

Best Regards,

--Jean Claude "JJ" Mallein, Jr., 2014-2015  
President Tri-Valley Estate Planning Council

**September 4th, 2014**

[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 2)  
**Guest Cost:** \$45.00 dinner

*Reservations and cancellations must be received by Tuesday, Sep 2nd at 2:00 p.m.  
to be assured of a reservation.*

Please send your check today!

or

Pay with a credit card online  
<http://www.123signup.com/register?id=dxcsv>  
Questions? Call Krysta at 925.778.1165