



## September 2015

Welcome back! On behalf of your new board, I hope you had plenty of time for rest, relaxation, and rejuvenation this summer and are as excited as we are for the new Tri Valley Estate Planning Council Year. Your new board met this summer to plan for the coming year, and I'm really looking forward to working with them this year. We're off to a great start and during our meeting we set goals to specifically improve in three areas this year, those being programs, membership, and sponsorship.

In the area of programs, our member survey made it pretty clear that our membership values the education provided by TVEPC and that you're looking for high quality presentations. We plan to deliver! Bob Jacobs has taken lead on lining up great programs for us this year and my Vice President Denise Chambliss has been helping him hit the ground running. So far he's got speakers lined up to give us an economic/market update, talk to us about things to watch out for when naming trusts as beneficiaries of IRA accounts, and a session on mediation services related to trust and estate disputes. I know Bob and Denise are working hard to fill the rest of the calendar, so if you've got any suggestions, please let us know.

One of the other priorities we identified for the year is to improve the value of our networking. While our existing members are the best, we feel it's really important to continue to attract new professionals to the organization. Ours is a people business, and knowing who has the expertise our clients need for services outside the scope of our own practices is a great way to help the clients we care about. To that end, Beth Attebery and Frankie Ross are teaming up to make sure we're attracting the best and brightest the Tri Valley has to offer to our meetings. If you know someone that you think would be a good fit, by all means please extend an invitation for them to join us.

It goes without saying, but this organization wouldn't be able to do all we do if it wasn't for the support of our sponsors! To make sure that we continue to be able to find out more about service providers and charitable organizations that can help us and our clients, Erin McGlynn and Clay Selland are working

on lining up sponsors for the year. In addition to being able to put an ad in the member directory or sponsor a meeting, this year we are also going to have an opportunity for people or organizations to be our wine sponsor this year. It should be a lot of fun and a great way to get your name and message in front of our membership.

Finally, I want to thank the other board members who are helping to make TVEPC the great organization it is. Our past President, JJ Mallein has been super helpful showing me the ropes. Our new Treasurer, Holly Ito is helping make sure our books balance and our bills are paid, and our Secretary Jennie Hoopes is making sure the i's are dotted and the t's are crossed. And of course we have Krysta and Wade keeping us all on track. My thanks to you all! This should be a great year for TVEPC and I'm honored to be your President.

Sincerely,  
Ken Perine, CFP®  
**2015-2016 President Tri-Valley Estate  
Planning Council**

**September 10th, 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 8)  
Guest Cost: \$55.00 dinner  
\$60.00 (call in after 2pm on Sep 8)**

*Reservations and cancellations must be received  
by Tuesday, Sep 8th 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=ptrnc>  
Questions? Call Krysta at 925.778.1165