



Dear Member,

Next month (September) we will begin our fall meeting schedule for the Tri-Valley Estate Planning Council. Our speaker on Thursday, September 7 will be Margaret Hand. She'll be speaking to us about Spendthrift Trusts. We're looking forward to a great program that evening!

Patti Barsotti, our program chairperson, has been working hard arranging top-notch speakers for this fall. In October we will hear from Catharine Baker, California assemblywoman. In November we'll hear from Dr. Glenn Hammel about "Undue Influence through Eyes of the Victimizer."

We have a new Board of Directors for the 2017-2018 year. Here are some brief introductions to our Board members:

Robert B. Jacobs, President: This is Bob's third year on the Board of Directors. He previously served as Program Chair and Vice-President. Bob is impressed with the caliber, experience, knowledge, and capability of the Council members. He hopes to continue the legacy from prior years of informative programs and valuable professional association that are the Council hallmarks.

Frankie Ross, Vice-President. This is Frankie's third year on the Board, which gives him an opportunity to have an impact on member experience and satisfaction as a TVEPC member. This year his plan is to provide support to the President and assist other board members when needed. Increasing the TVEPC reserve funds is a difficult but achievable goal which he would like to spend some time accomplishing.

Cynthia L. Brown, Treasurer. When Cynthia was in law school, she discovered that she loves tax law! After law school, Cynthia worked for large CPA firms and realized that she likes CPA work better than law work, even though she might be the only English literature major that ended up as an accountant. She does tax planning, accounting, and tax return preparation for individuals, businesses, trusts, and estates, and is happy that no two days at the office are the same! Cynthia is very happy to serve as Treasurer for TVEPC.

James J. Phillips, Secretary. Jim Phillips will be on vacation in Europe during our

September meeting. He's been a certified specialist in Estate Planning, Trust, and Probate Law since he opened his office in Pleasanton in 1990. Jim holds an LL.M. in Tax. He's pleased to be serving the professionals in the Council through his service on the Board.

Patti Barsotti, Program Chair. This is Patti's second year on the Board. She has been a member of TVEPC for several years. This is the second year she has served as Program Chair, and she is pleased to be of service to the Estate Planning and Wealth Management Community.

Kirk Dobson, Membership Chair. Kirk's impression of TVEPC is so positive he wanted to be more involved by joining the board. The position of membership chair allows him to share the advantages of belonging to Tri-Valley. Through the interview process, he learns about the practices of new and prospective members, and how we may mutually benefit through their participation. Kirk suggested his partner Chris Riel seek a board position as well. His younger perspective and energy have proven to be a great addition to the Board. Kirk feels it is a privilege to work with such a capable and caring Board of Directors.

John Lewman, Sponsorship Co-Chair. This is John's second year on the Board of Directors. He finds his service on the Board to be professionally rewarding, and he is looking forward to the coming year's programs.

Chris Riel, Sponsorship Co-Chair. This year Chris hopes to contribute to TVEPC by reshaping the Council's sponsorship opportunities and growing the organization through member recruitment.

Denise Chambliss, immediate past President. Denise has previously served on the TVEPC Board of Directors as Program Chair and Vice-President. She serves on the Board so that she can "be part of an important group of accomplished professionals in the Tri-Valley area operating in the multi-faceted and complex estate planning and wealth management space."

Our Executive Director, **Krysta Patterson**, is not a formal member of the Board of

Directors, but she attends all Board meetings and she actively manages the business of the Council. She keeps things running smoothly. She brings to the Council more than 15 years' experience in project management, event planning, general office administration, and more. As she pursued a college degree, Krysta quickly identified her talents of attention to detail, accuracy, and focus-measured results and she has applied these to creating successful management outcomes for every client. Often referred to as the "the underlying glue that keeps an organization alive and functioning," Krysta is passionate about giving more than expected; resulting in long-term valued relationships and prosperity for organizations. Many thanks to Krysta for keeping our Council on the right track.

Looking forward to meeting with you on September 7!

Robert B. Jacobs
2017-2018 President
Tri-Valley Estate Planning Council

September 7, 2017

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
September 5)
Guest Cost: \$55.00 dinner
\$60.00 (call in after 2pm on September 5)

Reservations and cancellations must be received

by Tuesday, September 5th 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=hxgvp>

Questions? Call Krysta at (925) 778-1165