TRI-VALLEY ESTATE PLANNING COUNCIL

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February 2014

Welcome to 2014! I hope those of you who made it to our January Blackhawk event left there feeling energized and with some ideas to take home and to the office to make things more authentic in your life both personally and professionally. For those that couldn't attend, Mike Robbins did a really nice job. If you ever have the opportunity to hear Mike speak, he is worth it. Thank you to all our guests from the other councils for joining us. We had a full house with 80 attendees. Also a big thank you to the meeting sponsors: Wells Fargo, LivHome, Redwood Mortgage, and Joseph Blake and Associates.

It is now February and Greg Finn, TVEPC's speaker chair has lined up another wonderful speaker for us. Bob Lew is the President and Founder of Planning and Financial Advisors. The topic of his talk to us is "Leveraging Large IRA's into large Charitable Gifts". He is a well known expert on charitable planned giving and has spoken not only at various organizations in the Bay Area, but also across the United States. He is a fellow estate planning council member with San Francisco where he has served on the board, and is also a board member for the Northern California Planned Giving Council. I hope you will join us for this very informative evening.

It has been brought to my attention that I should make another announcement concerning CE credits from 2012. I am specifically mentioning this again because I have been told our attorney members will be turning in their CE credits for 2012. You may notice that there are missing continuing education credits from your records if you can access them online. Unfortunately, sign in sheets for meetings in 2012 were never turned into the various organizations (CFP©, CPA, MCLE) that our members belong to. Once this was brought to the board's attention last spring (2013), multiple attempts have been made to acquire those records, but we have not been successful. I am very upset that this has happened to our members, and on behalf of the board I want you to know we are all sincerely sorry for this inconvenience and advise you that we are doing everything possible going forward to ensure this does not happen again.

Through this, we have found a solution with respects to MCLE as we are considered a Multiple Activity Provider and are given a blanket authorization during each renewal period to offer California MCLE credit for legal education activities. It is the responsibility of the attendee to maintain a copy of the certificate of attendance provided at each approved educational meeting for four years enabling you to self report the programs you registered for and attended. We are working for similar solutions with respect to CPA and CFP® CE credits and will keep you updated with information as it becomes available.

Finally, it is hard to believe we are down to just a few more meetings for this fiscal year and it is time to start to think about the 2014-2015 year. I would like to invite the members who have an interest in participating on our board to communicate that interest to Krysta Patterson (TriValleyEPC@gmail.com). It is always good to get new blood and new ideas on how to make our organization better. I will look forward to seeing all of you next Thursday, February 6th.

Best Regards,

--Mary Ballin, CFP©, 2013-2014 President
Tri-Valley Estate Planning Council

February 6th, 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 Feb 4)
Guest Cost: $45.00 dinner

Reservations and cancellations must be received by Tuesday, February 4 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=dxcdh
Questions? Call Krysta at ***925.935.9691***