



January 2017

As 2016 is coming to a close, the board of your Tri-Valley Estate Planning Council is putting in the extra effort for our next meeting on January 5, 2017. Our January meeting is our largest meeting of the year and well attended as we are joined by members of the Estate Planning Council of Diablo Valley and very special event sponsors. For this exciting event, we will meet at the Crow Canyon Country Club.

January 5, 2017 Program. For this joint meeting, we are fortunate to host Timothy F. McCarthy for his presentation on Observations on Investment Concerns Relevant to Estate Planning Professionals and Their Aging Clients. Tim McCarthy will discuss topics of current interest and concern in the financial service industry with an emphasis on considerations for the estate planners and aging clients, including discussions about problems and solutions for the aging customers, their trust attorneys and other advisors, and trends in international investments and long term portfolio risk mitigation.

Tim is author of *The Safe Investor: How to Make Your Money Grow in a Volatile Global Economy*. McCarthy has dedicated his entire career to the financial services industry and his experiences include serving as Chairman and CEO of Nikko Asset Management in Tokyo, Good Morning Securities in Seoul, CEO of Jardine Fleming in Hong Kong, President of Charles Schwab and Co., and President of the Fidelity Investment Advisor Group.

Membership Recruitment. One of my personal goals for our Estate Planning Council is to increase our membership. I am pleased to report that we can working well on this goal, but we can still accommodate new members. I again ask each of our current members to invite potential

new members to our next meetings. Inviting potential new members is a win-win, it is good networking for you and offers an opportunity for your guests to expand their profile in the Tri-Valley area among professionals servicing the public's estate planning needs in a wide variety of services. If you have any questions about our membership recruitment, Frankie Ross, of The Principal Financial Group, is our membership coordinator. We do feature a prorated membership for members joining mid-year.

Happy Holiday!! I wish each and every one of you a wonderful holiday season and I look forward to seeing you at our joint meeting on January 5, 2017 at the Crow Canyon Country Club.

Sincerely,
Denise E. Chambliss, Esq.
2016-2017 President
Tri-Valley Estate Planning Council

January 5, 2017

[Crow Canyon Country Club](#)

711 Silver Lake Dr.

Danville, CA 94526

5:30 P.M. Cocktail Hour & Registration

6:30 P.M. Dinner and Speaker

All Council Members and Guests Cost: \$75.00

Reservations and cancellations must be received by Tuesday, January 3rd at 2:00 p.m. to be assured of a reservation.

Please send your check today!

or

Pay with a credit card online

www.123signup.com/register?id=nbdrf

Questions? Call Krysta at 925.778.1165