



## *President's Message*

As professionals in the field of estate planning we are all accustomed to working in a highly regulated environment. Economic, legal, regulatory, and political developments frequently change the way we work and staying abreast of best practices has never been more important. In the wake of several high-profile controversies in the past year private professional fiduciaries and trust officers have found themselves in the legislative and regulatory crosshairs as well as under heightened scrutiny from the courts. Like all challenges this presents an opportunity for the true professionals to differentiate themselves from the pack.

Also, if you haven't already, connect with the TVEPC on LinkedIn:

<http://www.linkedin.com/groups/Trivalley-Estate-Planning-Council-4561590/about>

I'm looking forward to seeing you all in May for a very interesting talk!

*Steve Polaski*

## **“Best Practices for Fiduciaries Who May Pay Themselves Only With Court Approval”**

The court will approve reasonable fees for necessary services rendered in the performance of the fiduciary's duties. Synthesizing the wisdom of countless attorneys and private professional fiduciaries, **Margaret Hand, Esq.** will be our speaker this month, and will outline for us those steps fiduciaries and their attorneys should take before asking the court for its approval.

Ms. Hand is a fellow of the American College of Trust and Estate Counsel (ACTEC) and a Certified Specialist in Estate Planning, Trust, and Probate Law. She is the author of numerous chapters in the practice guides published by Continuing Education of the Bar and by LexisNexis Matthew Bender. Ms. Hand has been teaching fiduciary accounting through the CalCPA Education Foundation for the past five years and she lectures at professional education programs throughout California. She is a graduate of U.C. Berkeley, Boalt Hall School of Law.

Join us on May 2<sup>nd</sup>!

*This meeting is sponsored by:*

**Dick and Mimi Warga**  
**DMW Lifetime Financial Planning**  
**1202-A Concannon Boulevard**  
**Livermore, CA 94550**  
**925.449.7830**

**Thursday, May 2, 2013**

**Marriott Pleasanton**  
For Directions click [HERE](#)

**6:00 PM Wine and Registration**  
**6:30 PM Dinner and Speaker**

**\$40 Members Pre-Registration**  
**\$45 - Call in after 1:30 PM on Apr 30**  
**\$45 Guests**

**Reserve TODAY!!**

<https://www.123signup.com/calendar?org=tvepc>

**Pay online with a credit card or**  
**reserve online and send a check to the**  
**TVEPC office**  
**781 McKean Place**  
**Concord, CA 94518**

**Mark Your Calendars!**

**Annual Membership**  
**Meeting and Social Event**  
**June 6, 2013**  
**Campo di Bocce**