



March 2016

Greetings all! I hope your year is off to a great start, and for all of our tax preparing colleagues, best wishes for a smooth tax season.

Our upcoming meeting on March 3rd is not to be missed! We are very fortunate to have Richard Weber, a distinguished Accredited Estate Planner, speak to our group on the topic of “Life insurance as an Asset Class”.

Dick is truly an industry pioneer. He practices as a fiduciary insurance advisor, bringing deep expertise in the insurance industry and an approach that puts the client first. He specializes in working with trustees of Irrevocable Life Insurance Trusts to help them manage their fiduciary responsibilities to trust beneficiaries. He is also frequently called in to mediate equitable resolutions when disputes arise between policy owners and insurance companies. He’s a frequent speaker on a variety of insurance topics and is one of the highest-rated presenters for the Society of Financial Service Professionals, a multi-disciplinary association for which he is a past president.

Dick is truly one of the leading authorities on life insurance and this is sure to be an informative session. We look forward to seeing you on March 3rd.

I’d also like to take this opportunity to remind everyone that, as is our custom, we won’t be meeting in April. Instead, we’re all invited to join our friends at the Diablo Valley Estate Planning Council for their meeting on

April 20. Mark your calendars and plan on attending what I’m sure will be a great meeting, and we’ll look forward to seeing you back here in May.

Sincerely,

Ken Perine, CFP®

2015-2016 President

Tri-Valley Estate Planning Council

March 3rd, 2016

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 Mar 1)

Guest Cost: \$55.00 dinner

\$60.00 (call in after 2pm on Mar 1)

*Reservations and cancellations must be received
by Tuesday, Mar 1st 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=pnpvx>

Questions? Call Krysta at 925.778.1165