



November 2015

I am really looking forward to our upcoming meeting on November 5. I personally believe that at the root of most problems you'll find a failure to communicate, so anytime I can pick up new tips and tricks to help me improve, I'm interested. If I can share those techniques with clients in dispute, then that's even better!

This month we're very lucky to have Bette Epstein, Esq. come present on the "Use of Mediation in Estate Planning, Trust Administration, and Trust, Estate and Conservatorship Disputes". Bette will be providing an overview of the mediation process and how we can all use it effectively in our own practices. She'll also be sharing specific techniques that even the most experienced of us should find valuable.

I encourage you all to attend and to bring a colleague that might benefit from this presentation. Because I believe that we are all ultimately in the business of helping people, this is the kind of information that, regardless of our specific area of expertise, we can all benefit from.

I also wanted to thank Mary Ballin and Mosaic Financial Partners for sponsoring this meeting.

We couldn't do all we do without our sponsors, so we really appreciate the support.

As I'm writing this, the deadline to post an ad for your firm in our Member Directory is fast approaching. I encourage you to contact us ASAP if you'd still like to be able to get your information in front of the top Estate Planning professionals in the Tri Valley.

Sincerely,

Ken Perine, CFP®

**2015-2016 President Tri-Valley Estate Planning Council**

**November 5th, 2015**

[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 Nov 3)**

**Guest Cost: \$55.00 dinner**

**\$60.00 (call in after 2pm on Nov 3)**

*Reservations and cancellations must be received  
by Tuesday, Nov 3rd 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=pvsqy>

Questions? Call Krysta at 925.778.1165