



September 2013

It's that time of year again when the children go back to school, the harvest season is upon us, and we start another year with our Tri-Valley Estate Planning Council friends and colleagues. Thank you very much for being part of our group and joining us for the upcoming year. **Gregg Finn** did such a fantastic job with our speakers last year, that I asked him to continue this year as our speaker chair and he graciously accepted. I think you will be pleased with the topics and speakers we have in store for the coming months.

There are a few changes this year that you all should be aware of. The first is **Bonni Hendricks** needed to step down as our administrative staff person for personal health reasons. She was definitely a rock for this group for many, many years and we greatly appreciate all the service she provided for us. We could have never made it this far, for so many years if it wasn't for all her help and tireless efforts to make everything run smoothly. She will definitely be missed.

The good news is we have been able to hire **Krysta Patterson** as our new administrative staff person. Many of you probably know Krysta from your association with other professional groups in the area, and if you do, you also know that she is very efficient and organized and is a huge asset to every group that uses her services. If you haven't already introduced yourself to Krysta, please take a moment to do so. You will find her to be very warm and friendly.

**Our website address has changed!!!** Our new website address is: [www.tvepc.org](http://www.tvepc.org). Since I know everyone has our group saved as a "favorite", please take a moment to update the address in your web browser so you can stay up to date on all the fantastic meetings and information that we will have posted there for you. In addition, please join our LinkedIn group, Tri-Valley Estate Planning Council <http://www.linkedin.com/groups/TriValley-Estate-Planning-Council-4561590>.

**Membership Dues!!** If you haven't already done so, please renew your membership with TVEPC. Once again we have been able to keep the price of our annual dues unchanged at \$95.00. We don't want you to miss an opportunity to be included in the annual membership directory, so don't wait to go online to renew and while you are at it update your contact information <https://www.123signup.com/renew?Org=tvepc>. All members with paid dues by 10/15/13 will be included in this year's directory.

**Calling all Sponsors ---** For those of you that have been around for a while, you know we offer opportunities for meeting sponsorship and directory advertising. **Meeting Sponsors:** Our sponsors help to offset the cost of our meetings so we can keep the price of the dinners reasonable. Meeting Sponsorship is for Members and their respective companies. **Directory Advertisements** are available for this year's membership directory. Directory Sponsorship is also for Members Only. Benefits and costs for all sponsor opportunities can be reviewed here <https://www.123signup.com/event?id=bkkfd>. These sponsorship opportunities need to be paid for and advertisements submitted to [TriValleyEPC@gmail.com](mailto:TriValleyEPC@gmail.com)

by 10/15/13.

Finally I would like to thank **Steve Polaski** for serving as President last year and to everyone that has served on the board in years past and who is currently serving on this year's board. I want you to know how much I appreciate all of you and the time you have given or are giving to make this a wonderful professional organization. Because of all of you, our membership has a great year to look forward to.

Our first meeting is September 12<sup>th</sup>. If you haven't done so already, please go online and register today!

I look forward to seeing you all there!

Mary Ballin, CFP®  
President 2013-2014

## Personal Property: An Important & Often Neglected Component of Estate Planning

Presented by: **Silvio M. Coccia & Eileen R. Coccia**  
ESC Appraisal

**September 12th, 2013**

[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 Sep 10)**

**Guest Cost: \$45.00 dinner**

*Reservations and cancellations must be received by Tuesday, September 10 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/event?id=bkkqt>

**This Months Meeting Sponsored by:**

**Lori Luckenbach of**



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