



# TRI-VALLEY ESTATE PLANNING COUNCIL

January 2008

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## Welcome Bay Area Estate Planning Councils!

### *President's Message*

I hope that you all enjoyed a fun filled bus ride to San Francisco and tour of Bonhams and Butterfields. Thank you to Bonhams and Butterfields and Steve Turner for arranging and hosting the evening and a Big Thank You to Celia Mason!!

We are working hard on our Blackhawk event, which is going to be held this year on January 10<sup>th</sup>. Celia has lined up a fantastic presentation by Renaissance. This company assists professional advisors with their client's charitable giving arrangements.

As in the past, we are inviting three other estate planning councils to join us that evening. This event is a great opportunity to invite guests who might be interested in joining our group. Additionally, I have found that this venue is a nice event to invite your support team to join you. What with all that the Blackhawk Museum location has to offer it allows them to have an enjoyable and interesting time.

On a final note – I have been really impressed with the attendance at our meetings so far this year! Please join me in making a New Year's resolution to attend and participate – you won't be sorry!

- Jennifer Thaete

Visit us online – [www.tvepc.com](http://www.tvepc.com)

## **“My Clients are Not Rich, Sophisticated, Charitable or Interested”**

Are your clients among the 78% of Americans who set up charitable giving arrangements with the assistance of their professional advisors? Charitable Remainder Trusts (CRTs) can generate needed retirement income as well as provide a charitable legacy for your clients while reducing estate, capital gains and income taxes. Donor Advised Funds (DAFs), a simple Private Foundation alternative, is perfect for the client who is looking to save taxes now and create a legacy of charitable giving.

Please join us to hear **Kevin McGrath**, Senior VP with Renaissance Administration LLC, as he shares real life case studies to illustrate how you can play an active role in your clients' charitable giving by introducing them to charitable remainder trusts and donor advised funds. With more than 5,000 CRTs under administration, Renaissance is the nation's largest third-party CRT administration company.

**Thursday, January 10, 2008**

**Annual Blackhawk Museum Event**  
**Blackhawk Car Museum**  
**3750 Blackhawk Plaza Circle, Danville**  
**[www.blackhawkmuseum.org](http://www.blackhawkmuseum.org)**

**Wine and Hors d'oeuvres – 5:00 PM**  
**Hosted by: The Wheelchair Foundation**  
**Dinner and Speaker – 6:30 PM**

\$40 Mail-in Registration  
\$45 At the door

*Reservations and cancellations must be received by Monday, January 7th at 1:30 pm. Please send your check today! Or call Bonni 925.686.4819*

**Meeting Sponsored By:**

**Linda Jaffe**

**John Muir Health Foundation**  
**1400 Treat Blvd.**  
**Walnut Creek, CA 94597**  
**925.947.4449**