



TRI-VALLEY ESTATE PLANNING COUNCIL

Feb 2011

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President's Message

The only word that adequately describes the last two events for your Tri Valley Estate Planning Council is AWESOME! Yes, thanks go out to Barbara Beery, Diane Woodward, Mary Ballin, and of course, our fabulous Bonni Hendricks for coordinating our all Bay Area estate planning council holiday reception on December 2nd at Picans. Another word would be WOW, for the warm ambiance of Picans, delicious food to accompany the tasting of a variety of bourbons, and the engaging conversations with members of the San Francisco, East Bay, Diablo Valley Councils, and your Tri Valley Council.

The only way to describe our annual Tri Valley hosted, all Bay Area Blackhawk program would be that it exceeded expectations on all fronts. Special thanks to Michele Matsumura for providing us with one of the very best presenters on the estate planning circuit in Professor Sam Donaldson. His in depth coverage of 2010-2011 estate planning and tax issues combined with a sense of humor that makes one think he had a previous life as a stand up comic, confirmed that we were indeed most fortunate to have him as our lead off presenter for 2011. I am confident we all left better informed regarding the new estate planning tools available as a result of the legislation signed by President Obama on December 17. The final thanks goes out to **John Muir Health** and **Mechanics Bank** for their co sponsorship of this exceptional evening.

So, we head into our February program with a full head of steam. Let us continue to invite guests from all of our estate planning disciplines as your Tri Valley Council provides abundant opportunities for education, networking, and of course, we do have fun! See you soon -Ira

“How to Advise Your Clients Before and After the Fire”

Property and casualty insurance is a topic many advisors feel comfortable they understand. And they feel confident in helping their clients meet their risk management goals by reviewing their clients' policies. However, a vast majority of advisors have never personally suffered a significant loss. Nor have they had to deal with the reality of a home owner's insurance policy and the tremendous difficulty and challenge in navigating the claims settlement process.

Ora Citron is an experienced financial advisor who suffered an almost total loss when her home burned in 2009. She will share her experience and how it has fundamentally changed the way she provides risk management advice to her clients. Ora will be joined by **Brian Trouette**, a Property & Casualty broker to discuss what you should be looking for in reviewing your clients' homeowner's policies. You will be surprised how much of what you thought you knew may not necessarily be true!

Join us on:

Thursday, February 3, 2011

at the

Marriott Pleasanton

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

\$35 Preregistration
\$40 after Jan 31st

Reservations and cancellations need to be made by January 31st to be assured of a space

Send a check to the council office today
781 McKean Place Concord, CA 94518
or
by credit card, click below.

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

Meeting Sponsored By:

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