



TRI-VALLEY ESTATE PLANNING COUNCIL

February 2010

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President's Message

It's already time for our next meeting and we just had our January meeting a few days ago! I hope everyone had a good time at the Museum and I would like to thank our sponsors, the John Muir Health Foundation and the Wheelchair Foundation for their support of this annual, joint-Council event. Their contributions make a difference in the quality of the program as well as in the cost to our attendees.

I hope each of you met someone new during our social hour. One of the "Objects and Purposes" of the Tri-Valley Estate Planning Council is "to provide a forum where trust officers, attorneys, accountants, life underwriters, financial planners and charitable planners in the area may exchange views and become better acquainted with each other and their work". Or maybe you found out that you were a "dolphin" and not a "cat" from participating in Dr. Hillman's demonstration. Thank you, Shane, for inviting him to present to us.

We are back on schedule for the rest of our year – the first Thursday of the month, except for April, when we are invited to the Diablo Valley group. Please mark your calendars and remember we are now meeting at the Marriott Pleasanton.

If you are a paid member and did not attend the Blackhawk event, please see Bonni Hendricks at our next meeting so that she can give you a copy of our Directory. - Celia Mason

Mark your Calendars!

March 4th
April 21st – with EPC Diablo Valley
May 6th
June 3rd

Everything you Ever Wanted to Know About the Social Security Administration... But Were Afraid to Ask.

Stewart Cruz is the Public Affairs Specialist – East Bay for the Social Security Administration in Walnut Creek, CA. He joined them in 2005 and has been making outreach presentations on all Social Security programs since 2008. He has a Bachelors degree in Communication Studies from San Francisco State University and should complete his Master's degree this May.

I encourage all of you to submit questions to Celia Mason or Shane Westhoelter as soon as possible, so that Mr. Cruz will be prepared to speak on the issues that are of the most concern to our clients. This can be a great opportunity to get answers to some of the more complex issues that keep us awake at night.

Thursday, February 4, 2010

MARRIOTT PLEASANTON
11950 Dublin Canyon Road - Pleasanton
For directions – www.tvepc.com

6 PM Wine and Registration
6:30 PM Dinner

\$35 Advance Registration
\$40 At the Door

Reservations and cancellations must be received by Tuesday, February 2nd to be assured of a reservation. Please send your check today!

For credit card payment, go to:

<http://www.123signup.com/calendar?Org=tvepc>

Meeting Sponsored By:

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