



TRI-VALLEY ESTATE PLANNING COUNCIL

June 2010

President

Celia Mason, JD, CSA
925.998.4678
cmason@celiamason.com

Vice-President

Ira Hillyer
925.256.3033
ira_hillyer@mechbank.com

Secretary

Steven Polaski, CFP®
925.977.8353
spolaski@summitbrokerage.com

Treasurer

Sue Tulis, CPA
925.838.9650
Sue.tulis@mtf4cpa.com

Membership

Timothy Hyden, Atty. Trustee
925.831.0636
tim@timothyhyden.com
&
Kirsten Barranti, Atty
925.474.0040
kirsten@keblawgroup.com

Programs

Shane Westhoelter
925.999.8699
shane@gfainvestments.com

Public Relations

Michele Matsumura, Atty
925.218.8984
Michele@mm-estateplanning.com

Special Projects

Mary Ballin
510.594.8365
mary@mosaicfp.com
&
Diane Woodward
925.314.8100
diane@oaktreewealth.com

Hospitality

Dick Warga
925.449.7830
Dmwarga@aol.com

Past President

Darrell R. Claridge, CFP®
925.895.2640
Darrell.Claridge@cnb.com

TVEPC Office

781 McKean Place
Concord, CA 94518-2835
925.686.4819
www.tvepc.com

President's Message

We are coming up on our last meeting of the 2009-2010 year for the Tri-Valley Estate Planning Council. At this time I would like to express my thanks and sincere appreciation to all the members of our Board of Directors for their contributions this past year. It doesn't happen unless everyone makes it happen.

I would also like to thank all of you for the courtesy and graciousness you have shown to our new members. Since September, we welcomed the following 13 individuals to our Council:

Jessica Abrams, Craig Bigelow, Rocio De Rodriguez, Thomas Godfrey, Kelly Hanna, Eric Hersh, David Hewitt, Holly Ito, Janet Kahn, Giles Miller, Peggy Nicholson, Ken Perine, and Lorena Renaud.

Thank you for allowing me the privilege of serving as your President and I wish Ira Hillyer and his Board great success.

- Celia Mason

2010-2011 Board of Directors

President – Ira Hillyer
Vice President -Shane Westhoelter
Secretary – Steve Polaski
Treasurer – Sue Tulis
Past President – Celia Mason
Programs – Michele Matsumura
Membership – Tim Hyden and Kirsten Barranti
Public Relations – Barbara Beery
Hospitality – Rachael Neil
Special Projects – Mary Ballin and Diane Woodward

June Finale!

For our June 3rd meeting, we will be gathering at McNamara's Steak and Chop House on the other side of the freeway from the Marriott. Besides the opportunity to socialize with our fellow members, this is our annual meeting, so we will be voting for our incoming Board of Directors. We are also honored that **Frank Jakubka** will be present to educate and enlighten us with a tasting of some Scotch whiskeys. Even if you are not partial to Scotch, Frank's presentation will be very entertaining, I promise.

Please feel free to invite your friends and associates. If you're lucky, you may even win a raffle prize.

Thursday, June 3, 2010

McNamara's Steak and Chop House
7400 San Ramon Road
Dublin

6 PM – 8 PM Hosted Reception Only

\$35 Advance Registration
\$40 At the Door

Reservations and cancellations must be received by Tuesday, June 1st.

Please send your check today! or
For credit card payment, go to the link below



June Event Sponsored By:

Jennifer Thaete
Law Office of Abramson and Thaete
1840 Fourth Street, Ste. 200
Livermore, CA
925.447.3322

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