



TRI-VALLEY ESTATE PLANNING COUNCIL

March 2010

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President's Message

I hope everyone enjoyed the presentation by Stewart Cruz from the Social Security Administration at our February meeting. He was very knowledgeable and very personable and a number of the attendees have already invited him to speak at their client meetings. He should bring a good response.

Our next meeting is March 4th and we will have the opportunity to find out what's really happening in the world of real estate foreclosures and mortgage modifications. Not to mention the estate planning and tax ramifications.

The Tri-Valley Estate Planning Council does not meet in April. We are, however, again invited to attend the Diablo Valley EPC meeting on April 21st. Invitations and details will be forthcoming. You have probably already received an invitation to the Northern California Financial Planning Association Conference. They have an extensive array of seminars and some outstanding speakers scheduled.

Thank you to all of you, for your participation, your support and for making our council one of the most active and hospitable organizations in the East Bay. Please encourage prospective new members to join us.

- Celia Mason

March Meeting Sponsored By:

Greg Finn
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"Foreclosures and Estate Planning"

Robert B. Jacobs, is a Bay Area attorney with over 20 years experience in Real Estate, Business and Construction Law. He graduated from J. Reuben Clark Law Scholl at Brigham Young University in 1987. He is a member of the Alameda and Contra Costa Bar Associations and a member of the Board of Directors of Eastern Alameda County Bar Association.

Mr. Jacobs will address the current concerns of foreclosures in the Bay Area, and how they have and can impact Estate Plans. In addition he will address the topic of Short Sales, and the future impact we should consider in Estate Planning. With the growing concern of foreclosures and short sales, this will certainly turn into a lively discussion and Q&A session. Bring your questions, and do not miss our next meeting. Even if we do not have time to address all the questions you or your clients might have, you will at least meet a local expert you can call for answers.

Thursday, March 4, 2010

MARRIOTT PLEASANTON

11950 Dublin Canyon Road - Pleasanton

6 PM Wine and Registration
6:30 PM Dinner

\$35 Advance Registration
\$40 At the Door

Reservations and cancellations must be received by Tuesday, March 2nd to be assured of a reservation.

Please send your check today!

or

For credit card payment, go to:

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