



TRI-VALLEY ESTATE PLANNING COUNCIL

May 2005

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President's Message

I write this shortly after Terry Schiavo's death, and wonder why the focus is on the directive and not the naming of an agent. It seems to me that if Ms. Schiavo had made clear she wished her husband and not her parents to make end-of-life decisions for her, or the reverse, the doctors and the courts (and perhaps even the relatives) would have readily accepted the instructions given by the designated agent. While the directives are helpful, there is no way a person can anticipate every circumstance or eventuality. A surrogate or agent designated after thoughtful consideration can evaluate the treatment and comfort care options, taking into consideration the principal's philosophy.

Climbing down off my soap box, I wish you all a wonderful spring, and look forward to seeing you at the meeting on May 5. We will be presenting the slate of members nominated to serve on next year's board. Again, if you have any interest in serving on the board, please contact me or Dick Warga. And, mark your calendars for our panel presentation at the June 2, 2005 meeting.

- Beth Trutner

"Alternative Minimum Tax Issues"

Karen Brosi is a Certified Financial Planner and Senior Tax Specialist enrolled to practice before the IRS. She advises clients in the areas of individual tax planning and family wealth planning. Karen has worked in the Palo Alto area for the last 15 years and is very active in her community. She will be briefly discussing the history of Alternative Minimum Tax, the basic around it and finally strategies on dealing with it. This will be a lively discussion about an area of taxation that is effecting more and more of our clients every day.

Join us for an interesting discussion!

Thursday, May 5, 2005

**Crowne Plaza Pleasanton
11950 Dublin Canyon Rd.**

6:00 PM Wine and Registration

6:30 PM Dinner and Speaker

\$30 Mail-in Registration

\$35 At the door

*Reservations and cancellations must be received
by Monday, May 2nd at 1PM*

to be assured of a dinner reservation.

Please send your check today! Or call

Bonni at 925.686.4819

Meeting Sponsored By:

**Dick and Mimi Warga
DMW Lifetime Financial Planning
1202-A Concannon Blvd.
Livermore, CA 94550
925.449.7830**

**Last Meeting of the fiscal year – June 2, 2005
Annual Meeting and Member Panel**