



# TRI-VALLEY ESTATE PLANNING COUNCIL

May 2010

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## President's Message

Congratulations to all on surviving another Tax Day! As you know, we do not meet in April in honor of this annual event, but our next meeting will be Thursday, May 6<sup>th</sup> and we have a very unique program planned. We will be presenting a Mock Trial of an Estate Planning situation that did not turn out the way the client's advisors anticipated. All of us know the right way to take care of our clients, but sometimes we assume that we have done all that is required when we formalize our recommendations and send our client off with their "To Do" list. Is this enough? You will get to decide.

June 3<sup>rd</sup> will be the last meeting of our year, as we are dark during July and August. This year we plan to gather at McNamara's Steak and Chop House in Dublin for some nibbles, networking and liquid libation. We will be voting for our 2010-2011 Board of Directors at the meeting, but we also have some extra special festivities scheduled. Please mark your calendars and plan to invite friends, family and associates to this fun event.

Thanks to all of you, for your participation, your support and your friendship.

- Celia Mason

*May Meeting Sponsored By:*

*Ira Hillyer  
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## "The Case of Walter G. Smith"

Walter G. Smith was diagnosed with terminal cancer in 2005. The client's financial advisor referred him to an attorney. Walter passed and his Estate remained. His wife Carol, had passed away in 2000 after long illness. They had 4 children: The plaintiff who is a teacher in the public school system, a sibling who is a doctor, and troubled sibling who has a drug problem. The youngest child was in a car accident leaving behind two children, a 21 year old college student and a 17 year old high school student.

A basic estate plan case, you may think, but come to the May meeting and find out what went wrong. Suit is being sought against the attorney and financial advisor and you the audience may need to be the deciding votes. This will be a night to remember as we hear the live discussion between the Heir(s), Mediator, Attorney and Financial Advisor, who will role play out this case.

If you have professional colleagues to introduce to the Estate Planning Council, consider this meeting. We will have education, questions and hopefully, a lot of fun! See you at the May meeting!

**Thursday, May 6, 2010**

**MARRIOTT 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, May 4<sup>th</sup>.*

**Please send your check today! or  
For credit card payment, go to:**

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