



TRI-VALLEY ESTATE PLANNING COUNCIL

November 09

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/ Hospitality

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
&
Bill Butler
415.627.6246
william.r.butler@citi.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

Are you ready for daylight savings time to end? I'm not. I've been enjoying our "Indian summer" and wish that it would continue for a bit longer. Thank you to everyone who joined us in October. Our Speaker was exceptionally informative and dynamic in discussing the tax traps in annuity planning and quite "technical".

This month we are meeting on the **second Thursday** and space is limited for our trip to Bonhams and Butterfields in San Francisco. You can leave the driving to us or, if you prefer to meet us there, please let Bonni know so we don't save you a seat on the bus. Please feel free to invite friends, relatives, clients and potential members.

November is our last meeting of the year, so I want to wish everyone a happy and healthy holiday season. In **January**, we will again be meeting on the **second Thursday** at the **Blackhawk Museum**. This is our annual joint meeting with the other Bay Area Estate Planning Councils and we have lined up another exceptional speaker – Dr. Mark Hillman, Ph.D. He is an international trainer, author, lecturer and psychotherapist and has appeared numerous times on CNN and CourtTV discussing how to profile a client, an adversary or anyone else.

Please RSVP with a check or credit card if you can join us at our November meeting and please remember that the bus will be **departing** at **5:30** from the Marriott Pleasanton, previously known as the Crowne Plaza, across from the Stoneridge Mall. - *Celia Mason*

It's a FIELD TRIP!

And certainly better fun than behind the scenes at the "Antiques Roadshow"! Please join us for our field trip to Bonhams and Butterfields. Stephen Turner and his associates will be providing us with bus transportation to SF so that we can have a tour of their facility, and learn about the appraisal and liquidation process involved when one of our clients passes away and their estate assets are put up for auction. This event is open to associates and family members, but we have a limit of only 50 attendees, so please get your reservations in as soon as possible. **The bus will be departing the Marriott promptly at 5:30 PM.** Wine will be served en route and we will be singing camp songs on the trip back.

We anticipate that we will be back to the Marriott no later than 9:00 PM, possibly earlier, if traffic permits. If you plan on attending and choose to use your own transportation, PLEASE let us know, so we can plan accordingly.

Thursday, November 12, 2009

5:30 PM Bus will pick us up!

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

\$35 Advance Registration
\$40 At the bus

Reservations and cancellations must be received by Tuesday, November 10th 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:

Stephen Turner

[Bonhams and Butterfields](#)

220 San Bruno Avenue

San Francisco, CA 94103

415.503.3222

Happy Holidays!

Next Meeting – January 14, 2010