



# TRI-VALLEY ESTATE PLANNING COUNCIL

October 2006

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## President's Message

A great group of members and guests, including new member **Tim Hyden**, attended our first meeting on Sept. 7. During the self-introductions we heard about many locations in the U.S. and around the world that created long-lasting memories, mostly of good vacations, for our members.

Chris Clarkson of Bernstein Wealth Management Group explained very clearly some of the most commonly used wealth-transfer methods. His handouts and slides were superb.

October is coming up fast, and there are important deadlines in the middle of that month, because our 2006-07 Membership Directory will be printed before Halloween.

First, your dues must be paid to ensure that you will be listed in the Directory.

Second, you can support the Council and get great exposure for your business by advertising in the Directory. Prices start at \$250, an incredible value that gives 12 months of opportunities to be remembered by all of the professionals in our group. Contact Bonni today!

At our meeting on Oct. 5 you will be able to learn from speaker Karl Bareither. During the self-introductions you'll also be able to learn from each other, because I'll ask you to describe, in one or two short sentences, a step that you took to improve the efficiency or quality of your work.

Warm Regards, Gary Smith

## "Renewal of the Business and the Family: A Holistic Approach"

Our speaker is **Karl R. Bareither**, CLU, founder and president of FBR System, Inc., a fee-based family business planning firm, that uses a holistic process approach to transfer wealth and renew both business and family. Karl is the author of "Becoming a Wealth Transfer Specialist" and creator of the FBR (Family & Business Renewal) System, (<http://www.fbsystem.com>) where he has designed an approach that helps advisors become experts at the left-brain/right-brain approach in communicating with family businesses and accomplishing successful legacy planning from both a technical and well-being perspective resulting in business success and family harmony. We hope you can come to learn from Karl a new process in family wealth and business transfer.

**Thursday, October 5, 2006**

**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 Tuesday, October 3rd at 1:30 pm, to be assured of a reservation. Please send your check today! Or call Bonni at: 925.686.4819*

**Meeting Sponsored By:**

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