



TRI-VALLEY ESTATE PLANNING COUNCIL

October 09

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President's Message

Thank you to everyone who joined us for our September meeting. Our speakers did a wonderful job as did the Marriott Pleasanton. The food was particularly good (especially the dessert) and the remodel was more beautiful and more impressive than I imagined.

Our October meeting is early as the first Thursday is also the 1st of October. Shane has invited a nationally recognized expert on suitability and tax issues of financial products to speak to us. I hope we will see you there.

As a reminder, our November meeting will be on the 2nd Thursday of the month, November 12th. We will have a field trip to Bonhams and Butterfields in San Francisco. Many of us are involved in the sale of assets or estate liquidations when one of our clients' passes and Bonhams will explain the process if an auction house is involved. They have generously offered to provide a bus so that we can begin our social hour upon departure, though seats are limited. Bonhams will also offer their version of "Antiques Roadshow" and you are invited to bring an item for evaluation. Clients and family members are welcome to join us for this event.

Please RSVP with a check or credit card if you can join us at our October meeting and please remember that we now meet at the Marriott Pleasanton, which some of us will better remember as the Crowne Plaza, across from the Stoneridge Mall. - Celia Mason

Meeting Sponsored By:

Julie Perry

Heartwood Health Inc.

48 Amigo Lane

Walnut Creek, CA 94596

925.947.6090

"Tax Traps in Annuity Planning"

Please join us at our next monthly meeting to hear national speaker and SEC expert witness, John Olson as he will discuss "Tax Traps in Annuity Planning," and provide updates on the status of index annuities, as viewed by the SEC.

John L. Olsen, CLU, ChFC, AEP is the President of Olsen Financial Group and is Director of Financial & Estate Planning for Equos Financial Group, LLC. in St. Louis, Missouri. John provides consulting services to attorneys, accountants, insurance agents, and financial advisors. He is the Immediate Past President of the St. Louis chapter of the National Association of Insurance and Financial Advisors (NAIFA), serves on the Board of Directors of the St. Louis Estate Planning Council, on the Continuing Education Advisory Board of the American Academy of Estate Planning Attorneys, and is a former Director of the St. Louis chapter of the Society of Financial Services Professionals (SFSP). John has written articles on life insurance, annuities, planning software, and financial & estate planning topics for my periodicals...should be a great meeting! Reserve today!

Thursday, October 1, 2009

NEW LOCATION!

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

6:00 PM Wine and Registration

6:30 PM Dinner and Speaker

\$35 Advance Registration

\$40 At the door

Reservations and cancellations must be received by Tuesday, September 29th to be assured of a reservation. Please send your check today! For credit card payment, go to:

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