



TRI-VALLEY ESTATE PLANNING COUNCIL

September 2006

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President's Message

Summer activities will be ending soon, and it's time to plan for one of the first events of the Fall – our Sept. meeting.

Our meetings provide both educational and networking opportunities, and this year you'll have more time to get to know other members and their guests during dinner. The speaker will come to the podium 10-15 minutes later than in the past. I urge you to take advantage of the enhanced opportunity to learn about the activities of those around you.

Soon after we sit down, each member and guest will give a self-introduction. At our first Fall meeting we traditionally say a bit about our recent vacations, but this year I will ask you to recall your best or most memorable travel experience and why it stands out in your memory. Be prepared!

This is the time of the year to consider carefully whether you can support our Council as a sponsor in one of two ways.

You can help us cover the cost of the Membership Directory by advertising in it. You must act on this opportunity by early October. Or, you can sponsor any of our regular meetings by letting Bonni know about your interest. Either way your business gets great exposure!

Warm Regards, Gary Smith

“Keeping It in the Family: Planning for Efficient Wealth Transfer”

To start off our new year, on September 7, 2006, our speaker is **Christopher J. Clarkson, CFA**, a Director at Bernstein Global Wealth Management, who advises the firm's West Coast clients regarding complex investment planning issues. Chris has expertise in multi-generational wealth transfer, philanthropy, diversification planning for holders of concentrated portfolios (directly held shares and employee stock options) and pre-transaction planning.

Chris will explore wealth transfer strategies. According to traditional investment advice, volatility undermines investment returns and, in turn, many planning strategies. However, Chris will discuss research that has found that the optimal planning for wealth transfer can harness the power of volatility in structuring new trusts and managing ongoing trusts.

Come and learn from Chris and network with members and guests.

Thursday, September 7, 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, September 5th 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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