



# TRI-VALLEY ESTATE PLANNING COUNCIL

September 09

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## President's Message

Welcome Everyone! It's time to cordially invite you to attend our September meeting of the Tri-Valley Estate Planning Council. I always look forward to our September meeting because I miss seeing my friends and fellow Council members while we are "dark" during July and August. One of the things that makes our Council special is its members, that means YOU, and the friendliness and camaraderie that we enjoy when we gather for our monthly meetings. Plus, we have great speakers presenting on timely subjects.

I want to thank **Ira Hillyer** for the terrific job he did last year as our Programs Chair. This year, new member **Shane Westhoelter** has the honor and he has already lined up some exciting programs for us. (Can Estate Planning topics be exciting?)

I would also like to thank Past Prez **Darrell Claridge** for his outstanding leadership this past year and the lovely **Jennifer Thaete** for sponsoring our June social at Campo di Bocce – a good time was had by all who attended.

Please RSVP to Bonni if you can join us at our September meeting and please remember that we have changed our location (again) to the Marriott Pleasanton, which some of us will better remember as the Crowne Plaza, across from the Stoneridge Mall.

See you there!  
Celia Mason

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*Please note: this is your LAST hard copy newsletter sent via snail mail, unless otherwise requested.*

*If we haven't yet received your dues, an invoice is enclosed.*

## "Where to Look for Bulls, Bears, the Opportunities of California State Bonds and Why Consider Asset & Creditor Protection Strategies for Small Business Owners"

**Bill Cass** along with **Alex Hayes** from Putnam Investments will present these important topics.

Mr. Cass is a Sr. Vice President and a Retirement Products Marketing Manager for Putnam Retail Management. In this role, he is responsible for retirement product development and marketing, specifically focusing on IRA products, retirement income, and wealth management initiatives. He speaks regularly throughout the country to groups of financial advisors on a wide range of financial planning topics.

Prior to this role, Mr. Cass held various positions within Putnam Investor Services and Corporate Marketing. Mr. Cass currently holds his NASD Series 6,7,26, and 63 licenses, and is a Certified Financial Planner™ professional. He has been in the investment industry since he joined Putnam in 1990.

Alex Hayes is the local North California product wholesaler for Putnam Investors Services and will be accompanying Mr. Cass at the meeting.

## SEPTEMBER 3, 2009

### NEW LOCATION!

**MARRIOTT PLEASANTON**  
11950 Dublin Canyon Road - Pleasanton  
For directions – [www.tvepc.com](http://www.tvepc.com)

**6:00 PM** Wine and Registration

**6:30 PM** Dinner and Speaker

**\$35 Mail-in Registration**

**\$40 At the door**

*Reservations and cancellations must be received by Tuesday, September 1st to be assured of a reservation. Please send your check today! or call Bonni at 925.686.4819*

*Meeting Sponsored By:*  
*David Rice*

[Tri Valley Community Foundation](http://www.trivalleycommunityfoundation.org)  
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*September Meeting is sponsored by:*



[www.tvcfoundation.org](http://www.tvcfoundation.org)