ESTATE PLANNING COUNCIL
of Diablo Valley

President's Message

It was great to see so many people at the February meeting, and thanks to Keith Schiller for the lively presentation. For the March meeting, we turn away from the technical aspects of estate planning, and address the personal issue behind every estate plan – the fact that every plan is predicated upon the death of a person who is someone's father, mother or other loved one and that sometimes death does not come easily.

Many of us feel at ease talking about the technical aspects of estate planning but we are much less comfortable when faced with the personal grief issues that might accompany the discussion. At that time we are thrown back on our own personal experiences, and feel the lack of professional training in this area. So I think our March speaker, Libby Palomeque will be a fitting follow-up to Keith's February presentation.

We look forward to seeing you there and as always, we appreciate your support of the Council.

-Valerie Neale

Join us
on
April 20th

"Litigation over Estate Plans and Intra-family Challenges"
Barbara Jagiello, Esq.

East Bay and Tri Valley councils will join us!

"By the way, I have cancer": Working with clients after their diagnosis.

Join us on March 16th when **Ms. Libby Palomeque, CFP®** will discuss estate planning for clients with a terminal illness. CFP and grief counselor Libby Palomeque specializes in condensing complex emotional topics into a format that is practical and immediately applicable for busy professionals. This presentation offers overarching principals, as well as concrete tips on what to say, (and what not to say) when a client announces that they have cancer.

With over 1.2 million Americans diagnosed with cancer each year, each of us will eventually find ourselves interacting with cancer patients in our lifetimes. Whether you are empathetically challenged or naturally empathetic, this session will help you to refine and enhance your communication skills in this sensitive situation.

Ms. Palomeque has always been fascinated by emotions, both within the investment sphere and without. For that reason, Libby specializes in working with clients who are undergoing the "big life transitions" of death, divorce, and retirement. In addition to her financial designations, Libby is also a Certified Grief Recovery Specialist, and is a level II Degriefing practitioner. Libby believes that grief is the single most transformative experience in the human emotional lexicon.

Wednesday, March 16, 2011

Lafayette Park Hotel
3287 Mt. Diablo Blvd. Lafayette

6:00 PM. Wine and Registration
6:30 PM Dinner and Speaker

Cost: $40.00 dinner (preregister)
$45.00 (at the door)

Reservations and cancellations must be received by Monday, Mar 14th at 1:30 p.m. to be assured of a reservation.
Please send your check today!
or
Pay with a credit card online

http://www.123signup.com/calendar?Org=epcdv
or

call Bonni at:
925.686.4819

Libby's ability to address "difficult" topics in an enjoyable, practical manner has made her a sought after speaker within the financial planning, accounting, and estate planning communities. She has spoken for such events as the FPA National Conference, the FPA National Retreat, CIMA's national conference, and Money Quotient's national conference, to name a few. Libby believes that no topic is well delivered unless every audience member walks away with at least one idea they can immediately implement in their practice; she strives to deliver upon that ideal every time she takes the stage.

Libby is a managing director and portfolio manager for First Republic Investment Management, a $5 billion firm located in San Francisco; Libby manages over $130 million in assets.