

The Board has mentioned in previous announcements we are attempting to stop the attrition of Estate Planning Council of Diablo Valley Active Members and increase the Council's membership.

We previously proposed amending the bylaws to include new proposed professional categories. Based on input from council members (special thanks to George Coughlin II, CFP®), we have narrowed these new proposed categories and will submit to the membership for approval an amendment to Bylaw II 2.a. at the October 17, 2018 meeting to be held at the Lafayette Park Hotel at 6:30 PM.

Please note that categories one through five and category nine remain the same. The proposed additional categories are six, seven and eight.

Bylaw II 2.a. shall be amended as follows:

**ACTIVE MEMBERS**

There shall be nine (9) categories of active members:

1. Attorney;
2. Certified Public Accountant (CPA);
3. Certified Financial Planner (CFP®);
4. Chartered Financial Consultant (ChFC), Chartered Life Underwriter (CLU);
5. Trust Officer, Private Fiduciary;
6. Chartered Financial Analyst (CFA); Certified Investment Management Analyst (CIMA);
7. Chartered Retirement Planning Counselor (CRPC);
8. Judicial Officer, Probate Examiner, Probate Referee;
9. Member-at-Large

Thank You,

**Kirsten Howe**

**President, EPCDV 2018-2019**

**October 17, 2018**

**Lafayette Park Hotel 3287 Mt. Diablo Blvd. Lafayette, CA**

6:00 P.M. Wine and Registration

6:30 P.M. Dinner and Speaker

**Member Cost: \$55.00 dinner (preregister) / \$60.00 (at the door)**

**Guest Cost: \$60.00 dinner (preregister) / \$65.00 (at the door)**

Please note all reservations and cancellations MUST be made no later than 2pm the Monday before the monthly meeting. If reservations are received after the Monday before the meeting, the cost will be considered at the door. Refunds will not be granted to cancellations that are received after Monday at 2pm. All cancellation requests and at the door registrations need to be made in writing to

[EPCDiabloValley@gmail.com](mailto:EPCDiabloValley@gmail.com)

Please send your check today! or Pay with a credit card online

<https://www.123signup.com/register?id=hkvzc>

**“Proper Handling of Firearms in Trusts and Estates”**

**Presented by:** Joseph F. Fenton, Esq.; *Campbell Green, LLP*

Step by step process addressing firearms devises

**About the Speaker**

Attorney and licensed California DOJ firearms safety instructor

**Dinner Menu**

**Salad**

*Radicchio, pear, blue cheese, toasted walnuts, pomegranate-yogurt dressing*

**Entrée**

*Braised short rib, Butternut squash, fregula pasta, pecorino, kale*

**Vegetarian**

*Warm vegetable pasta*

**Dessert**

*Banana crème trifle, Vanilla pastry cream, Chantilly crème, bananas, shaved chocolate, caramel*