

President's Message

Welcome to the 2008-2009 year of the Estate Planning Council of Diablo Valley...it promises to be interesting. The credit crisis continues to unfold and we also look forward to the 2008 Presidential election.

I attended my first meeting in 1995. I arrived early and had the opportunity to see all the name tags laid out. I was very impressed by the number and the variety of top notch professionals included. Over the years, I have had the opportunity to meet and work with many of them.

The Estate Planning Council of Diablo Valley is the largest and most vibrant council in the Bay Area. We can continue that distinction by inviting guests to the meetings and then encourage them to become members. The membership guide-lines and an application are available in the "Membership" section on our website: www.epcdv.org.

The Board is excited by the September program. It features a panel of experts that will be discussing choice of fiduciary. I'm sure that many of us have seen the results of unfortunate fiduciary choices in our practices and/or our families. In October, John Suttle, Esq. will be speaking on funding of educational expenses. We are working to find an interesting array of speakers and topics for the rest of the year. If you have an idea of a topic that might be of interest to the members, please let Rob Silverman know. We're always open to suggestions.

As is our custom, we will celebrate our new members at the September meeting. I hope that you can bring a guest and join us. *Lynn Gardner*

ADVISING CLIENTS ON HOW TO CHOOSE A FIDUCIARY

Estate Planning professionals know that the potential consequences of choosing a fiduciary (particularly a trustee) are many, broad-ranging, and dramatic; and that a poor choice can lead to a family, personal and/or financial disaster.

This month we are thrilled to have a multi-disciplinary panel of three Estate Planners: **Lisa Carvalho, Esq., Mildred Brown, CPA, and Kelly Johnston** will share their valuable experience, stories, and insight. By doing so, they will shed light on common misconceptions, "red. Flags", and useful criteria for choosing the right fiduciary.

Wednesday, September 17, 2008

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

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

***Cost: \$40.00 dinner (if mailed in)
\$45.00 (at the door)***

*Reservations and cancellations must
be received by Monday, Sept 15th at
1:30 p.m. to be assured of a
reservation. Please send your check in
the enclosed envelope today! or call
Bonni at:*

925.686.4819

Mark Your Calendars For the 2008-2009 season!

September 17, 2008

October 15, 2008

November 19, 2008

January 21, 2009

February 18, 2009

March 18, 2009

***April 22, 2009
(Fourth Wednesday)***

May 20, 2009

June 17, 2009

A law partner with Reed Smith, Lisa's practice includes fiduciary litigation - sometimes involving complex probate and trust administration matters - representing individuals, corporate fiduciaries and third party claimants. She has given numerous presentations to attorneys and other professionals on the subject of how fiduciaries can manage risk.

Mildred has been a tax partner with Mowat Mackie & Anderson for over twenty years. She is a CPA, and has an M.S. in taxation from Golden Gate University. A substantial part of Mildred's tax practice involves representing individuals, including trustees, who have a variety of interests in ongoing trusts and estates.

Kelly Johnston is V.P. & Director of Personal Trust with Wealth Management at the Mechanics Bank. Kelly is a Certified Financial Advisor and serves as President of the East Bay Estate Planning Council. She is a frequent speaker on the topic of trust and estate administration, an area in which she has over fourteen years of experience.

Dues are Due!

If we haven't yet received your 08-09 dues, a second invoice is enclosed.

***Send a check today! or
Pay online! www.acteva.com/go/epcdv***