

We had our inaugural general member meeting for the year on last Wednesday the 18<sup>th</sup> of September 2019 which was attended by approximately 40 members and 15 guests. The presentation was related to Criminal Elder Abuse which was presented by Ms. Jill Lynn Henderson. I know I learnt a lot from this as it was very informative. For those who attended I am hoping you felt the same. Over the past five years or so, our membership has continued to decline at steady rate. The reason for this being retirements and a general rate of attrition. Your Board has been working diligently in attempting to arrest this trajectory by continuing to provide you our members with quality programs and a value driven membership addressing the major ideas and topics in the estate planning arena. At the same time, we remain very conscious of the increasing incremental costs and are attempting to curtail them without sacrificing the quality of our presentations.

We need your help. You can help us by each one of you attempting to introduce one or more new members this year. Also, by inviting guests to our general meetings we have found this to be a very productive introduction to our organization, however, converting those guests to membership status remains a challenge. May I request that you follow up with your guests with the idea of then introducing them as full fledged members. This will help us immensely with not only the vibrancy of the council, but also better the financial standing of our organization.

I have been blessed to be having working alongside me a very talented Board of Directors, who bring their ideas and suggestions to the table. These are professionals who endeavor to make our group the best estate planning council in all respects possible. This year we introduced the Premier Member category and I am very happy to report that this new category comprises 20% of all members who have renewed their membership to date. We are continuing to work on being able to recognize these members in any way we can, and I urge all of you to consider this membership category as this will assist us immensely with our financial position. Lastly a shout out to all members who have not renewed their membership...please do so at your earliest convenience. We have about 45 members who have not signed up. Please inform us if you have any matters that is precluding you from renewing your membership.

Please also be advised that the CalCPA Advanced Estate Planning Symposium East Bay Chapter is holding its annual event on Thursday November 14th 2019, at the Round Hill Country Club, 3169 Round Hill Road, Alamo. This event is well attended, and this year's program is bringing forth a lot of timely and interesting topics, with Continued Education of 4 hours.

I take this opportunity to thank you all for your continued support, and with that I am hoping to have another year of stellar events and programs presented to you. The year forward promises to be one with a lot of change in legislation, and our programming will attempt to keep you as informed as necessary. Please also consider our sponsorship programs that we have instituted a few years ago.

If you have any matters of thought, ideas, questions or suggestions, please do contact me, or any of the other board members and we commit to addressing all such matters in your best interest.

**Jamshed B. Gandi**

2019-2020 EPC Diablo Valley President  
Estate Planning Council of Diablo Valley

(Turn over for meeting information)

## “Updates from the County Assessor's Office”

**Presented by: Gus Kramer**  
*Contra Costa County Assessor's Offices*

An evening discussion with the Contra Costa County Assessor about real property transfers, changes of ownership, changes of control, parent child exclusion, and other transfers, both the procedures, requirements, and the documentation.

### **About the Speaker:**

Gus Kramer was elected to the Office of Assessor of Contra Costa County in 1994. Kramer has served the taxpayers of Contra Costa County for more than twenty-five years as the County Assessor.

Gus grew up in Bay Point, California, and is a graduate of the San Francisco College of Mortuary Science and the University of San Francisco.

His public career in Contra Costa County began in 1974. Kramer embarked on his tenure with the County at the Contra Costa County Sheriff Coroner's Office, later moving to the Contra Costa County Probation Department, and finally to the Contra Costa County Public Works Department until 1994 when he was elected to the position of County Assessor. In addition to his service to Contra Costa County and its residents, Kramer was also elected to the position of Martinez City Clerk in 1986.

As County Assessor, Kramer has overseen remarkable improvements to streamline the operations of his office, eliminate backlogs, and achieve higher levels of public service, all while operating substantially under budget. The State Board of Equalization acknowledged his office as one of the best managed assessors' operations in California.

Gus Kramer is a member of the California Assessors' Association and the International Right of Way Association and has more than 30 years as a licensed real estate salesperson.

**October 16, 2019**

**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: \$60.00 dinner (preregister) / \$70.00 (at the door)**

**Guest Cost: \$80.00 dinner (preregister) / \$90.00 (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*

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

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

### **Dinner Menu**

#### **Salad**

*Apple salad, Spinach, grapes, celery,  
blue cheese dressing*

#### **Entrée**

*Pork chop, mushroom gravy, creamy polenta*

#### **Vegetarian**

*Butternut squash ravioli, Brown butter sauce,  
toasted hazelnut, seasonal vegetables*

#### **Dessert**

*Pumpkin bread pudding, spiced rum crème  
anglaise, chantilly*