

Happy February! As we approach the first tax season in almost a decade without major tax law changes or uncertainty, we'll be looking at the deeper long-term impacts of estate planning on a family's values and future. At our February 19 presentation, nationally known CFP® and Master of Laws Justin Miller will discuss "Secrets of Successful Families: Transferring Values with Wealth for a Lasting Legacy." Miller, who has spoken at estate planning conferences throughout the country, will explore the best ways to combine wealth planning with communication and family values to create a legacy that endures for generations.

At last month's meeting, the Estate Planning Council of Diablo Valley's New Year got off to a good start. Audience participation reached new levels of excitement as animated members engaged in a lively discussion of Walnut Creek attorney Frank R. Acuna's presentation, "The Collapsing Policy and Other Insurance Disasters; How to Cope in a Changing Environment."

We are also pleased at the success of our new policy of accepting advertising in this year's EPCDV membership directory, and want to thank our generous and forward-thinking advertisers for their contributions. For clarity's sake, we want to point out that while advertisements *in* the directory are welcomed and encouraged, no promotional materials may be sent to the list of members. As is mentioned on page three, the roster is not to be used as a promotional mailing list.

Finally, we're glad that our new policy of making sure our presentations end close to 8:00 p.m. is helpful to members who need to get home at a reasonable hour. As always, audience members who want to continue the conversation after that time are encouraged to come up and talk with the speakers in person.

We look forward to seeing you at the Lafayette Park Hotel on February 19!

*-Terry Allen, CFP®, AWMA<sup>SM</sup>, President 2013-2014*

## February 19th, 2014

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: \$45.00 dinner (preregister) / \$50.00 (at the door)**

**Guest Cost: \$50.00 dinner (preregister) / \$60.00 (at the door)**

*Reservations and cancellations must be received by Monday, February 17 at 2:00 p.m. to be assured of a reservation.*

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

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## "Secrets of Successful Families: Transferring Values with Wealth for a Lasting Legacy"

By integrating traditional wealth planning with a focus on family values and communication, families can create a legacy that will survive multiple generations. This program goes beyond just helping you to "prepare the money for your family," but helps you think through the more challenging question of "how do you prepare your family for the money?" This seminar will present the characteristics of successful families who have transferred their values – in addition to their wealth – to future generations, and will provide practical ideas and tools to help families build a lasting legacy.

- How do successful families redefine the true wealth of the family?
- What are the issues around wealth that cause most wealthy families to fail at preserving their wealth and their family values?
- How do successful families pull together their investment management, tax and estate planning, and family governance into one holistic approach to preserve and grow their wealth?
- How can families improve communication regarding wealth and deal with tough questions, like the "pre-nup. issue"?
- How do successful families transfer wealth and values in a healthy way to future generations?

Mr. Miller works closely with legal, accounting, insurance and investment advisors to provide comprehensive wealth planning advice to clients and their families. He is a frequent speaker on tax, estate planning and family governance topics at professional education conferences throughout the country, including events hosted by the CalCPA, Golden Gate University, Santa Clara University, Seattle Children's Hospital, Stanford University, the State Bar of California. He received a master of laws in taxation and a juris doctor from New York University School of Law and a bachelor's degree, with honors, from the University of California at Berkeley.

### REGISTER NOW!!!

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## Dinner Menu

### Salad

*Bistro Salad, honey balsamic vinaigrette, shaved pears, blue cheese*

### Entrée

*Grilled Salmon, asparagus, roasted fingerlings, salasa verde*

### Dessert

*Pear tart, local pears, almond, fruit coulis*