ESTATE PLANNING COUNCIL
of Diablo Valley

President's Message

Our February meeting featured David Goerz of Highmark Capital. His presentation on capital markets was followed by a particularly lively question and answer session.

Rob has lined up terrific programs for the rest of the year. Ann Fallon joins us on March 18th to present a discussion on estate planning issues for the divorcing client. Our April meeting will be held a week later than usual, on April 22nd. This joint meeting with the Tri-Valley and East Bay Estate Planning Councils features tax guru, Dean Zerbe. He should have plenty to talk about, given the recent activity in Washington, D. C. Myron Greenburg will round out the year with a presentation on advanced estate planning techniques.

Bonni has ordered permanent name tags that we will turn in at the end of every meeting. New members will have an identifying ribbon affixed to the bottom of their tags for the first year of membership.

The following are the new members who have joined since the year began in July:

John Callagy	Barbara Collins
Linn Coombs	Bette Epstein
Maggie Harmon	John Harrison
Matthew Hart	Phyllis Kao
Anders Lee	Stephen Lovell
Sarah Nix	Trina Planchon
Paul Saad	Kathryn Schofield
William Sefton	Richard Weber

Please seek out these new members and make them feel welcome. See you on the 18th! *-Lynn Gardner*

"How Your Estate Planning Advice Must Change, For Your Divorcing Client"

We are fortunate to have been successful in lining up as this month's speaker **R. Ann Fallon, Esq.**, of Whiting Fallon Ross & Abel, of Walnut Creek, a law firm well known for its family law expertise. Ms. Fallon will present on an important topic about which many estate planning professionals could benefit from expanding their knowledge: "How Your Estate Planning Advice Must Change For Your Divorcing Client".

A certain portion of every estate planning professional's practice involves clients who are contemplating divorce, have a divorce pending, or have recently divorced. Family Law and Trust & Estate Law issues overlap, and these issues must be reconciled so that our clients are well served in both contexts. When such reconciliation does not occur, very serious unintended consequences can result.

Ms. Fallon's practice focuses on family law, and has extensive experience in the area of retirement and employee benefit plans. Her background will enable her to shed valuable light on the crucial ways in which clients can and should change their estate planning documents at various stages of the divorce cycle, and specifically how to address asset retitling, and retirement plan and life insurance beneficiary designations.

Ms. Fallon received her B.A. from Fordham University, and her J.D. from Boalt Hall, University of California at Berkeley. She has been a practicing attorney for more than twenty-five years, and is certified by the State Bar of California as a Certified Family Specialist.

Ms. Fallon has published many articles, is a frequent speaker, and has served on numerous committees and advisory boards for professional organizations. She is a Fellow of the American Academy of Matrimonial Lawyers (AAML), and was the recipient of the 2008 Honored Fellow Award.

Wednesday, March 18, 2009

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, Mar 16th at 1:30 p.m. to be assured of a reservation. Please send your check in the enclosed envelope today! or Pay online!
www.acteva.com/go/epcdv
call Bonni at:

925.686.4819

Mark Your Calendars!
Next month our meeting will be on the 4th Wednesday
April 22nd