

I encourage you to join us this month when our speaker, Joseph F. Fenton, shares with us a very practical, how-to process for dealing with firearms in estate planning and administration. The laws governing possession, ownership and transfer of firearms, both state and federal, are complicated. Whether clients have one gun or a valuable collection, they really need our guidance. A mistake can have serious consequences for executors and successor trustees. Don't miss this opportunity to add this valuable knowledge to your estate planning toolkit.

Also at our October meeting we will be voting on a proposed amendment to our bylaws. 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

Finally, as I shared with you at our September meeting, one of our Board's goals for this year is to reverse the trend of dividing membership and to increase our membership. I remind you to join this effort by inviting a guest to attend a meeting. We were all somebody's guest once – pay it forward!

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

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

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

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*