

Welcome back! On behalf of this year's Board of Directors, I look forward to your return to the Estate Planning Council of Diablo Valley for the 2016-2017 year. I hope you had an enjoyable Summer and break from the council. We are anticipating an exciting year of speakers and topics. I know our speaker chair, Tim Hyden, has a great Fall line-up for us. Please assist Tim (th@hydenzakheimlaw.com) with suggestions for possible topics or speakers for 2017 that you might enjoy and find educational.

Our mission is to provide opportunities for the practitioners of multiple disciplines to meet for education designed to improve proficiency regarding estate planning and to foster relationships between and among our different specialties. In my years on the council, I have certainly learned a lot but as importantly, I have developed relationships with other professionals in related fields that have become colleagues and friends.

I look forward to seeing you in a few weeks and welcome any feedback from members regarding our council. Please continue to support the council with your attendance at our monthly meetings and try to bring a guest as often as possible. It is our objective, as your Board of Directors, to increase membership this year, so please assist us as we work toward this goal.

We expect the 2016-2017 year to be a great one for the Estate Planning Council of Diablo Valley!

Cordially,
Sarah S. Nix, Esq.
President, EPCDV 2016-2017

September 21st, 2016

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=njdfm>

“Offshore Asset Protection Trusts”

We are fortunate to have co-speakers for our September meeting. They will both address how to advise clients in creating plans using Offshore Asset Protection Trusts. They will discuss "firewall" protections against unknown and unforeseen lawsuits as part of a comprehensive estate plan in order to prepare clients for potential subsequent lawsuits which may arise threatening assets.

About the Speaker

Neal Rubin, MBA. He is the managing director of International Custody & Asset Protection Solutions for City National Rochdale Professionals, New York.

Background: former director of Credit Suisse Private Advisors New York City.

Jeffrey M. Verdon, Esq. he is the managing partner of Jeffrey M. Verdon Law Group, LLP, a boutique law firm specializing in trusts and estates located in Newport Beach, California.

Background: more than 30 years of experience designing and implementing comprehensive estate planning and asset protection structures.

REGISTER NOW!!!

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

Dinner Menu

Salad

Arugula and frisee salad with toasted walnuts, blue cheese, poached figs and balsamic dressing

Entrée

Chicken saltimbocca with creamy polenta, broccolini and charred tomato sauce

Vegetarian

Grilled squash and portabella mushroom stack with creamy polenta, broccolini and charred tomato sauce

Dessert

Apple quince cheesecake, cinnamon crumble topping, salted caramel, whipped cream