



East Bay Council News

May 2010

President's Message

I can't believe we are nearly in May, with our final meeting of the year and our slate of candidates for next year's board looming. This year has passed much too quickly, which I suppose is a symptom of having a lot of fun. I have had a great experience serving as EBEPC President for this term and I thank you for your support. The year has been marked by some victories, some disappointments, and certainly some surprises. Above all, the best part of this leg of the journey has been getting to know more of you, and being directly involved in creating an environment where you have gotten to know one another and thereby strengthened our professional community. I view this term as part of a process where we constantly look at what our organization does well and what it can do better, to fulfill the objectives of all its members. In that spirit, I look forward to our next term and beyond, anxious to see how our group evolves and responds. Until then, I wish you, your families and communities a happy, healthy and restful summer. Have fun!

- David Levin

**Come VOTE at the election of
Officers and Board of
Directors - 2010-2011 term
ANNUAL MEETING
May 10, 2010**

"Planning and Drafting Investment Plans for Nonprofessional Trustees"

This month we have an expert on the topic of investment policy statements. This will be our last meeting of the season, so you don't want to miss it. We will learn about the importance of an investment plan, and the ins and outs of creating a plan for the non-professional trustee.

Our speaker this month is **Norman M. Boone, MBA, CFP®**. Norm is

Monday, May 10, 2010

Scott's Seafood Restaurant

Jack London Square
Oakland

6:00 PM Wine Reception
6:30 PM Dinner Meeting

\$35.00 paid in advance
\$40.00 at the door

Please make your **check** payable
to "EBEPC" and mail to:
781 McKean Place
Concord 94518

Or for **credit cards**:

<https://www.123signup.com/calendar?Org=ebepc>

Or call 925.686.4819
before 1 PM on
Thursday, May 6th

Meeting Sponsored By:

**Margaret Hand
Law Offices of Margaret Hand
1939 Harrison Street, Ste. 200
Oakland, CA 94612
510.444.6044**

founder and President of Mosaic Financial Partners Inc. His professional accomplishments are many, but here are a select few. Norm has been cited as one of "America's Best Financial Advisors" by Worth magazine/Robb Report every year since the list's inception in 1994. The January 2007 issue of Financial Planning magazine named Norm one of eight "Movers and Shakers" of the industry. In addition to managing his financial planning practice, Norm and his wife Linda Lubitz Boone have spent many years writing and speaking about the importance of Investment Policy Statements. Their book on the topic was published in 2004, and they have created an online software program to assist advisers in the creation of investment plans. Norm received his under-graduate degree from Stanford University and his MBA in Finance from the Harvard Business School.

**March Menu:
Parmesan Crusted Chicken**