



East Bay Council News

November 2008

President's Message

Greetings, fellow council members. I hope you are holding up well as we navigate the tumultuous waters of our economy. If you are looking for a worthwhile distraction, put our next dinner meeting on your calendar. Enjoy the company of your colleagues, draw on one another's expertise, and take in an excellent program.

Many of you will recall the engaging and interactive presentation by George Coughlin a couple of seasons ago. I know it is one program I remember well. Since then, we have heard many requests to bring Mr. Coughlin back for more and that is exactly what David Levin has done for us. I do hope you and a guest will join us.

In the meantime, be on the lookout for your 2008-2009 EBEPCC roster. We still have just one \$250 sponsor ad space available, so contact Bonni Hendricks if you are interested. We go to print early next week so your roster will be in your hands in November!

I hope to see you next month, but since this is our last newsletter in 2008, I will take this opportunity to wish you a safe and happy holiday season. May you have a prosperous and fulfilling 2009!
-Kelly Johnston

“Postmortem Retirement Plan Distributions: A Case Study to Hone Your Skills and Knowledge”

I know. At the risk of misreading your minds, some of you may be thinking that this topic seemed a bit more relevant back when your clients had more retirement assets with which to plan. Alas, to those cynics I propose to make your proverbial cup half full with these responses:

1. No matter the climate, this topic should continue to be relevant for nearly all of your clientele;
2. It is a subject area that never disappoints for lack of interesting and complex material, and it's always a good time to learn; and
3. By all indications, our discussion will take place in the same interactive workshop format as the last time we explored it.

Monday, November 10, 2008

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
“EBEPCC” and mail to Bonni in the
enclosed return envelope before
Thursday, November 6th
or call 925.686.4819

Meeting Sponsored By:

Kelly Johnston, CTFA
Wealth Management at
Mechanics Bank
1999 Harrison St. Ste. 810
Oakland, CA 94612
800.781.3441

Visit Us Online - www.ebepcc.org

George H. Coughlin II, CFP® is registered with the California State Corporate Commissioner as an Investment Advisor. He is a Past President of the East Bay Chapter of the Financial Planning Association and the Estate Planning Council of Diablo Valley. He has served as the public member of the Estate Planning, Trust and Probate Law Advisory Commission for the California Bar Association's Board of Legal Specialization, and well as the public member of the Taxation Law Advisory Commission.

A graduate of Cal Poly San Luis Obispo, and an MBA from University of Oregon and MS in Tax from Golden Gate University, George is a Registered Principal of ePLANNING Securities, Inc., which is a registered broker/dealer and a member of the FINRA/SIPC.