



# East Bay Council News

October 2008

## President's Message

If you are reading this newsletter, then you have managed to survive the tumultuous market conditions, at least for now... We kicked off the season in September with a great technical program by Ron Linder and since then, I believe we have all been glued to our favorite newspapers, Blackberry, or the Internet trying to stay on top of the latest news – Who is bailing whom out today? How will that affect the economy? How, in turn, are my clients being affected? Well, we are off and running this October with a very timely presentation on how the current economic environment affects wealth transfer planning. Matthew Brady of Barclay's Wealth will join us on October 13<sup>th</sup> to impart his knowledge and expertise and perhaps give us a glimpse into what may be coming 'round the next bend. I hope you won't miss what is sure to be a lively interaction.

On another subject, our new roster will go out in November. If you want to be included, please make sure your dues are paid. For a duplicate dues notice, please contact Bonni Hendricks at 925.686.4819 or [association\\_office@att.net](mailto:association_office@att.net). Also, please take advantage of our discounted dinner price for guests and bring a colleague to our October meeting. No matter what their area of practice, our next program is sure to be of interest!

-Kelly Johnston

## “Integrated Wealth Management for Changing Economic Circumstances: (or...Can Our Clients Make Lemonade from the Lemons?)”

To sum up the collective mood: Wow. This was one (or a collection of) October surprise(s) in the marketplace that probably made the manufacturers of antacid tablets downright giddy. After the diagnosing and prognosticating is over, however, the most important question may well be how we can use these circumstances to help or at least limit damage to our clients? Our second program of the season will address this issue by featuring a presentation concerning

the importance of correlating investment strategy and asset allocation to estate planning objectives in these turbulent times.

**Matthew Brady** is Managing Director at Barclay's Wealth, the wealth management arm of Barclay's Bank, where he leads the firm's wealth advisory group in San Francisco. A tax attorney by training, Mr. Brady started his career as a partner at Donovan Leisure Newton and Irvine in New York City. Then he was a partner at Coopers & Lybrand, and also has headed the Family Office group at Robertson Stephens. Matt received his law degree from Stanford University.

Matt's presentation will highlight how changing interest rate and inflationary environments affect wealth transfer planning.

**Monday, October 13, 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 "EBEPC" and mail to Bonni in the enclosed return envelope before Thursday, October 9th or call 925.686.4819

**Meeting Sponsored By:**

**David Chick**

**Capital Asset Planners**

**510.891.9088**

[dchick@capitalassetplanners.com](mailto:dchick@capitalassetplanners.com)

[www.capitalassetplanners.com](http://www.capitalassetplanners.com)

## Mark Your Calendars!

**November 10, 2008**

**January 21, 2009 w/SFEPC**

**February 9, 2009**

**March 9, 2009**

**April 22, 2009 w/EPCDV**

**May 11, 2009**

**Our newsletter is going online!**

**If you absolutely must have one snail mailed to you this year – please write**