East Bay Council News

May 2006

President's Message

Well we are at the end of another fiscal year. I think our program chair Walt Tchirkine did an excellent job this year in putting together an interesting and varied group of speakers.

I believe everyone will agree with me that our panel discussion lead by Deanna Lyon at the March meeting was very informative. The board would like your input as to whether this type of panel discussion format is something you would like to see more of in the future.

At our May meeting we will be discussing the election of Board Directors. We will vote on a proposed slate of board members to take the helm for our next year.

We will again be looking at our by-laws regarding membership requirements for the council. If anyone has any comments of the criteria used for admission to the council, please send your comments to me at jkessler_atty@yahoo.com.

As this is our last meeting, I would like you to also encourage your colleagues to join the council. The first step is to invite a colleague to our next dinner. See you on the 8th. *- JD Kessler*

Visit us online at www.ebepc.org

Postmortem Retirement Plan Distributions – Case Studies to Hone Your Skills and Knowledge

Determining the amount, procedures and timing of required distributions from qualified retirement plans and IRA's can be a costly stumbling block for the beneficiaries of deceased participants. Tonight's meeting provides planning professionals a chance to work in a small proactive group environment to untangle various distribution issues encountered in a real-life scenario.

Monday, May 8, 2006

Scott's Seafood Restaurant
Jack London Square
Oakland

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

$30.00 paid in advance
$35.00 at the door

Please make your check payable to "EBEPC" and mail to Bonni in the enclosed return envelope before Thursday, May 4th or call 925.686.4819

Meeting Sponsored By:

Andy Bryant
Lifemark Group
Chapel of the Chimes/Skylawn
32992 Mission Blvd.
Hayward, CA 94544
510.441.5596

CE Credit: This meeting will qualify for one hour of Continuing Education credit for CPAs, and CFP® professionals and is PACE accredited for CLU's and ChFC's. Attorneys: This activity has also been approved for continuing Legal Education Credit in the amount of one hour.

This will be a workshop – NOT a lecture. Experienced practitioners will have a great opportunity to confirm and refine their understanding of this complex subject while novice planners will be able to begin the learning process. We are very pleased to have **George H. Coughlin II, CFP®** facilitate this workshop.

Mr. Coughlin is a Certified Financial Planner and is registered with the state of California as an Investment Advisor. Mr. Coughlin offers tax planning assistance, he optimizes client distributions from qualified plans and IRA's and he also provides support to other professionals on a consultative basis.

George Coughlin is a Past President of the East Bay Chapter of the Financial Planning Association and the Estate Planning Council of Diablo Valley.

Mr. Coughlin has delivered numerous presentations to various professional organizations on the topic of distributions from qualified retirement plans and IRA's. Join us this month!