



## President's Message

Dear Members,

Wow(!) We had an exciting Networking Party this year and I can't say "Thank You" enough to our hardworking, dedicated Committee who made it all possible: Allyson Bradley, Megan Gorman and Giles Miller. The room was filled and we could barely stop the networking-frenzy long enough to give away our fabulous door prizes. Please feel free to share your stories with our Committee.

Now that we've properly rung in the New Year, let's switch gears from festive to frightening. Identity theft. It has probably happened to you, or someone close to you and it's only going to get worse.

In 2012, the U.S. Dept. of Justice reported that 16.6 million people were victims with \$24 billion in losses. The economic implication of identity theft is extraordinary, not to mention the emotional toll and financial impact affecting our clients. High net worth individuals are particularly vulnerable because they typically hold various accounts among several different advisors and have financial lives too complex to adequately monitor. Our program this month will address this timely topic and prepare you for how to address these concerns with your clients.

I look forward to seeing you at our next meeting.

Happy New Year,

A handwritten signature in purple ink that reads 'Liz Paulus'.

Liz Paulus  
President

## Meeting Speaker and Topic

**Terri Malone, Internal Revenue Service**

### Identity Theft Prevention

This presentation will cover the Internal Revenue Service's programs and procedures regarding identity theft prevention and processing returns for taxpayers who have been the victims of identity theft. Attendees will learn about the Service's ID Theft process with respect to filtering returns, notifying potential victims, using identity protection personal identification numbers, how online fraud is committed, and tips for identity theft prevention and reporting.

Terri Malone has been with the Internal Revenue Service for 30 years. She is currently a Senior Stakeholder Liaison Specialist in the Communication, Stakeholder & Outreach unit of the IRS' Small Business and Self Employed Operating Division. Ms. Malone works with tax professionals to identify ways the agency can be more responsive to customers' needs, and coordinates IRS outreach and education to the tax practitioner community and small business owners.

# Meeting Date

**Monday, February 9, 2015**

Scott's Seafood Restaurant, Jack London Square  
2 Broadway, Oakland, CA 94607

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

Char Broiled Pork Tenderloin with Roasted Garlic Apricot Sauce

or

Stuffed Portobello Mushroom with diced Peppers, Onions topped with Mozzarella



## Admin Tip!

**WHOOPS!** Did your name badge end up at home?

Please bring it back at the next meeting. Believe it or not a good number of them disappear costing the Council unnecessary expense of time and money to replace them. Thank you!

### Meeting Sponsor

**Kimberly Mills**



### Wine Sponsor

**Emerson DuBois**

