



President's Message

Thank you to all who attended our September meeting which proved to be a wonderful exploration of relevant issues in the business succession area. We had quite a few guests attend the September meeting and we currently have one new member in the works. We are committed to growing our membership this year, which grows primarily as a result of referrals from our existing members. As such, we are designating October as "Bring a Guest Month". All members that bring a guest will be entered into a raffle to win a gift from Peet's Coffee! So invite a colleague or friend to our next meeting on October 19th.

Now is your chance to showcase your business by becoming a [2015-2016 Wine Sponsor](#) and provide the group with your choice of buy one get one wine from BevMo. Take advantage of this opportunity for one of the next five remaining meetings.

We look forward to seeing you in October.

Warm regards,

Joy Soulier
President

Meeting Speaker and Topic

J. Timothy Maximoff, Hoge Fenton Jones & Appel Digital Estate, Social Media & Technology

Program description: It is a new world, and we are all living on the Internet. Our digital lives are convenient and complicated. As a result, professionals and their clients face new practical concerns. The program will explore this new paradigm, touching on clients' digital estate planning, online assets, retention of family legacies, practical post-death estate administration issues, tax, privacy and data retention issues, as well as relevant current developments.

Speaker Bio: J. Timothy Maximoff is a shareholder in the Trusts & Estates group at Hoge, Fenton, Jones & Appel in San Jose. He counsels clients in tax, estate planning and administration, and business matters. Tim's work encompasses the appropriate use of many types of trusts, family corporations, partnerships, limited liability companies, and foundations, as well as assisting his clients in the formation and operation of their business ventures. He is the past Chair of the Taxation Section of the State Bar of California and is a member of its Estate and Gift Tax Committee. Tim has been named a "Northern California Super Lawyer" every year since 2007, as chosen by his peers and through the independent research of Law & Politics and San Francisco Magazine. He is a Fellow of the American College of Trust and Estate Counsel (ACTEC).

Meeting Date

Monday, October 19, 2015

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

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

BAKED SALMON FLORENTINE - On a Bed of Creamed Spinach w/ Duchess Potatoes
or

NAPOLEON TOWER Portobello Mushroom Topped w/ Vegetables, Mozzarella, Tomato & Spinach



Admin Tip!

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