Financial Planning Forum Member Newsletter

October 2007

In This Issue

- President's Message
-
- Farewell to a Friend
- September Program
- Program Registration
- 2007 -2008 Program Calendar
- About FPF

Directors & Officers

Register For October 23 Meeting On-Line

(Click Here)

President's Message – Brad Elman, CLU

For those of you who attended our kick off meeting and 35th anniversary celebration, I know that you will agree that a wonderful time was had by all! For those of you who weren't able to attend, we look forward to seeing you October 23rd at 5:30. Thanks again to US Bank who sponsored our social hour.

Our next meeting features father and son lawyer team extraordinaire, Paul and Robert Roskoph of Roskoph Associates in Palo Alto. Their topic: Business Succession Planning. This will be review of the critical planning a business owner must go through to ensure the business's survival after he or she leaves the business. Included will be an interesting case study.

Farewell to a Friend

For the third week in a row, the Los Altos Town Crier is running an article about Ken Kaye. It is a testimonial to the type of man he was. Three years ago Ken asked me to be on the board of the Financial Planning Forum, and I am honored to be writing about him as your President.

Ken called me in August and bluntly asked me if I would be a pall bearer at his funeral. I opened my mouth to respond but nothing came out. I consciously tried again to respond to the question, and once again I couldn't form the words. The lump in my throat was pushing everything back down.

Ken and I have worked together with a few clients and we both enjoyed each other's direct communication styles and general frankness as it pertained to work. I suppose that when Ken decided to call me to make the final arrangements in his estate plan, it was with this in mind. My intention was to respond to him as frankly as I had in every other situation, but I found the words were not coming. All I could say to Ken was, "I need a minute." Eventually I told Ken that I would be honored. As was the case in all other aspects of Ken's estate plan, he had taken the time and care to make sure that things had been done properly and had been done in advance.

I went to visit him in the hospital and at home a few weeks later and he wanted me to know that he didn't want to be remembered as a cancer "victim". Instead, he said, "you can just let people know that I've reached the end of my journey with cancer."

Ken was a good man, a good friend, and a good estate planning attorney. I also know that he was good father and a good husband. My life is better for having had him on my journey.

2007-2008 Program

September 25, 2007
Walter Dewey
U.S. Bank
Capital Markets Update

October 23, 2007
Business Transition Planning
Paul & Rob Roskoph

December 4, 2007
Charitable Giving in Silicon Valley
Elenor Clement Glass
Chief Giving Officer SVCF

January 22, 2008
Long Term Care
Christopher Acker, CLU, ChFC

February 26, 2008
Love and Money
Speaker TBD

March 26, 2008
Making Rain: Positioning Yourself in the Market
Todd Flesner

April 23, 2008
ESOP's in the New Millenium
Tom Brady

May 23, 2008
TBA

This Month's Program

Business Transition Planning

Paul & Rob Roskoph

Roskoph & Associates

Paul H. Roskoph
Mr. Roskoph has specialized in tax and estate planning matters, and ha throughout his legal career. He obtained his certification as a specialist Specialization in Taxation in 1975 and in Probate, Estate Planning and was initiated.
Read more about Paul>>

Robert K. Roskoph
Mr. Robert K. Roskoph has been practicing in the estate, tax and business planning area since 1998. Robert represents individuals, families and businesses in all areas of estate planning, including "foundational" estate plans, asset transfer and strategic gift planning and charitable planning. His practice includes establishing and representing entities for estate planning, business planning and liability exposure protection purposes, including limited liability companies (LLCs), family limited partnerships (FLPs), Corporations (S and C), private foundations and public charities.
Read more about Robert>>

On - Line Registration Now Available

You can now register and pay for Financial Planning Forum membership and events on-line. Simply click on the links below and follow the directions on the website.

Financial Planning Forum Membership (click here)

Your payments can be made using a credit card or a bank account via 123SignUp.

The registration page will take you directly to the Pay Pal web site for payment. If you do not yet have an account with Pay Pal, it's a simple process to enroll.

We are hopeful that this will facilitate making it quick and easy to make reservations for future Forum events.

If you would like to mail in your payment: please make your check payable to the Financial Planning Forum and mail to:

Financial Planning Forum, C/O Karin Swanson, CPA, 2600 El Camino Real, Suite 600, Palo Alto, CA 94306

Call 650.842.0330

Register for October 23 Meeting On-Line

(Click Here)

Mail/Fax Meeting Registration Form
October 23, 2007

*Registration deadline is 5:00 PM October 19, 2007 * Late Fee = $10.00*

Member Name: ____ ($47)_________

Guest Name: ____ ($57) _________

Guest Name: ____ ($57) _________

Total Enclosed: $ __________ _

Meal Choice: ______ Meat or ______ Vegetarian

Please make your check payable to the Financial Planning Forum and mail to:
Financial Planning Forum
% Karin Swanson, CPA
2600 El Camino Real, Suite 600
Palo Alto, CA 94306

Questions: Call Karin @ (650) 842-0330
Fax: (650) 852-9912

Financial Planning Forum

2600 El Camino Real
Suite 600
Palo Alto, CA 94036

PHONE:
(650 842-0330

FAX:
(650) 852-9912

E-MAIL:
info@financialplanningforum.org

2007 - 2008
Meeting Dates
Sept. 25, 2007
Oct. 23, 2007
Dec. 4, 2007
Jan. 22, 2008
Feb. 26, 2008
Mar. 25, 2008
April 25, 2008
May 21, 2008

We're on the Web!

See us at:

www.financialplanningforum.org

About Our Organization…

The Financial Planning Forum, Inc. was founded in 1972 by a group of attorneys, accountants, financial planners, and life insurance professionals who recognized the mutual advantage of exchanging ideas and of networking with others who shared their interests in rendering quality services to their clients. The principal purpose of the organization is fostering professional growth through learning experiences and interaction.

Calendar and Activities

The Forum meets monthly, in September and October and from December through May.

- Each meeting includes a time for networking, dinner, and a featured presentation on a topic of current interest.
- Program formats include a mix of local and nationally recognized speakers, and seminars and panel discussions.
- Program topics include specific, technical discussions about recent financial, legal, tax and investment developments; and topics of more general interest, such as economic forecasts and demographic trends and implications.
- Monthly newsletter, occasional social gatherings, and a Web site. The Web site includes a membership directory where members can list and describe their businesses.

FINANCIAL PLANNING FORUM
2600 El Camino Real
Suite 600
Palo Alto, CA 94306