



TRI-VALLEY EXECUTIVE'S ASSOCIATION

P.O. Box 985 ♦ PLEASANTON CA 94566

PHONE & FAX 485-1394 ♦
www.trivalleyexecs.com

AUGUST 31, 2006

NEXT WEEK:

The next regular meeting of the Tri-Valley Executives' Association will be held on Thursday, **September 7**, at Vic's All-Star Kitchen at 7:00am.

The GREETERS will be **Phil Maser**, General Contractor and **Larry Brumm**, Real Estate Appraiser.

Jason Cooke of Herrmann Financial Services will finish his Classification that got cut short last week.

The CLASSIFICATION will be given by **new member, Dana Schumacher** of Telepacific Communications.

There will be a **Board Meeting** directly following the regular meeting.

GOLF TOURNAMENT:

The Annual TVEA Golf Tournament is scheduled for Thursday, **September 28** at Callippe in Pleasanton, and will be followed by dinner. To reserve your spot to golf or just come for dinner, call Ron Robinson 209-321-2787 or Marilyn Lewis 417-0512.

BROCHURES:

We have new brochures! Please take as many as you want at the next meeting. Since we have some new members, we will be reprinting again soon.

NEW MEMBERS:

TELECOMMUNICATIONS:

Dana Schumacher
Telepacific Communications
55 Nicholson Lane, San Jose CA 95134
Tel: 408-240-2190, Fax: 408-240-2191

MARRIAGE & FAMILY COUNSELING

Jim Moog, M.A. MFT, B.C.E.T.S
1439 Cedarwood Lane, Pleasanton CA 94566
Tel: 925-339-1964, Fax: 925-838-4575

CLASSIFICATION:

Jason Cooke was born and raised in the East Bay. He grew up and now lives in Walnut Creek. Admittedly, he considered himself somewhat of a nerd, being on the tennis team and attending science camp every year. He graduated from Long Beach State where he was in a fraternity... an academic fraternity.

After college, he married his high school sweetheart, Kim. She was attending St. Mary's at the time and he was told that if he married her, he'd have to pay for the remainder of her college tuition. Being the fool in love that he was, he couldn't wait until she graduated. They got married and he paid for her last year.

Jason loves outdoor activities and recently completed a triathlon in Lake Placid.

When Jason was 10 years old, he spent part of his summer vacation with his grandfather in Southern California. Two days before Jason was scheduled to come home, his grandfather passed away. That event changed his outlook on life and his passion for it.

After college, he went to work for GT Global, a mutual fund company, but felt uninspired in the large corporate atmosphere. He sought out a smaller community-based company and that's when he found Dave Herrmann.



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They started out as stockbrokers, but developed into financial planners, giving up their brokers' licenses and becoming certified financial planners.

There are two types of planning: quantitative - gathering assets, and qualitative - looking at life goals and how to achieve those goals financially. Jason provided comprehensive financial planning that looks at one's needs, mind, body and soul.

(To be continued... due to time constraints, Jason's presentation was cut short, so we will finish learning about Jason Cooke of Herrmann Financial at next week's meeting.)
