
MAY 21, 2015 NEWSLETTER

THIS WEEK:

The next regular meeting of the Tri-Valley Executives' Association will be on **May 28th** here at Vic's All-Star Kitchen at 7:00am.

GREETERS will be **Sheri Facciolla** of Patriot Pest Management and **Wayne Yeaw** of Alpha Omega Print & Marketing.

The TWO TRUTHS will be given by **Dave Jones** of Tiger Carpet Cleaning.

Mark Caufield of CDG Insurance will give his CLASSIFICATION.

THE WEEKLY "POT" REPORT:

TVEA's 50/50 raffle is at \$67 with 7 white marbles (\$5), 2 blue marbles (\$10) and 1 red marble (the Pot).

UPCOMING:

June 4 – **Allen Eddy**, Cal Coast Plumbing

June 11 – DISCUSSION

June 18 – **Kevin Gundry**, Custom Exteriors

June 25 – **Dave Cherry**, Big O Tires

MEMBERSHIP COMMITTEE:

Joe Goulette of JG Construction offered to join the Membership Committee Chaired by **Chuck Eggers** of Barons Jewelers.

During a brief discussion, a few ideas for increasing membership were suggested including going to Chamber mixers, having a booth at the 1st Wednesday Street Party, and a letter-writing campaign by the members, where every member would commit to writing letters to 20 of their contacts inviting them to a breakfast.

Think about who would be a good power partner for your or another member's business, and put your list together.

More details to come!

CLASSIFICATION:

Dave Parker is a local boy. He moved to Pleasanton in 1969 at the age of 5. He graduated from Foothill High School in 1982. He then went to Sacramento State, and in 1986 graduated with his Business Administration degree with a minor in Finance.

He worked in the mortgage department at Transamerica until 1991, when a friend of the family opened a mortgage company in Dublin. The brokerage became very successful and grew to 40 agents. In 1998 the offices split. Dave stayed in the Dublin office and worked with his new partner for 11 years.

In 1999 he met his wife Shelly who works in Human Resources at Valley Christian School. Dave & Shelly have 2 daughters, a sixth-grader, Sarah at Valley Christian and their other daughter, Megan is in college at Azusa Pacific.

Shelly had a friend that was a successful financial advisor for Edward Jones. After Dave & Shelly married, they used him for their investments. For the next 12 years, their friend had tried to lure Dave into the business.

In 2009, when the mortgage market turned, he was presented with an offer that was hard to refuse. One partner in the Danville office at Edward Jones was ready to retire and was interested in turning over his clientele to a new partner, someone he could trust to take care of his clients. After meetings with the partner, and then the partner and their wives, Dave was chosen as Greg's successor.

Dave Parker got his Edward Jones certifications and the partner passed on his thorough knowledge of the markets. After working with Greg for over a year, Dave has now taken over his clients in the Danville office.

Edward Jones is a Fortune 500 company that was founded in 1922 by Edward Jones, Sr. in St. Louis, Missouri. In 1980 they had 304 offices, which have

grown to 11,000 offices today (more than any other in the country) with 13,000 brokers, of which 628 are in California. The offices are not franchises, but are instead a partnership, which provides their clients with proper regulatory oversight. Edward Jones is a commission-based investment firm that has over 7 million clients and over \$570 billion in assets. Although his business is commission-based, Dave is at a point where he doesn't have to be concerned with whether or not he'll make money on a transaction, and is happy to provide a no-cost consultation.

They received the highest score by J.D. Power and Associates in 2015, in a Full Service Investor Satisfaction Study, and for the 6th year in a row, they were rated "Highest in Employee Advisor Satisfaction among Financial Investment Firms" by J.D. Power and Associates in 2014. For the 16th year in a row Edward Jones was ranked fourth as one of the "100 Best Companies to Work For" by Fortune Magazine in its annual listing in 2015. Dave believes that happy employees are the best at giving the best customer service. In Dave Parker's office it is him and a wonderful office administrator.

The philosophy of Dave Parker at Edward Jones: *Buy* quality investments; *Hold and Monitor* for long-term value; *Diversify*. He recommends mutual funds for their instant diversification; it would take 30-40 individual stocks in different sectors to be diversified with just stocks alone. Dave does not provide fiduciary services, but will give guidance; all decisions are made by the client. He also wants people to know that you don't have to change investments if you wanted to change firms to get better service. Investments are SIPC insured up to \$500,000 value per person/entity. There is no minimum portfolio size to work with Dave; he chooses his clients based on their potential for growth. The best referral for him is anyone selling a home, inheriting money, or changing jobs and may need to rollover a 401K. Another great referral is someone who has an account elsewhere, but who has lost touch with their broker.

They have a monthly newsletter with opinions on specific stocks or you can get a complete opinion on a particular stock. Since they are a global company, they are able to give regular updates on stocks and markets based on current events. Edward Jones also helps with retirement-related decisions. Dave advises those who are approaching the age at which they can draw from

their Social Security benefit to seek help in creating a strategy that provides the maximum benefits and higher income.

To sign up for the newsletter, to get information or buy a particular stock, or to do a no-charge transfer of your stocks to an account with Edward Jones, call Dave Parker - Phone: (925) 837-7730, Cell: (925) 640-8860

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