



TRI-VALLEY EXECUTIVE'S ASSOCIATION

P.O. Box 985 ♦ PLEASANTON CA 94566

PHONE & FAX 485-1394 ♦

www.trivalleyexecs.com

MARCH 22, 2007

NEXT WEEK:

The next meeting of the Tri-Valley Executives' Association will be held on Thursday, **March 29, 2007**, at Vic's All-Star Kitchen at 7:00am.

GREETERS will be **John Hovland** of Onstad's Insurance and **Marco Lindsey** of Transworld Systems.

The VALUE will be given by **Beverly Hoey** of The Law Offices of Beverly Hoey.

The CLASSIFICATION will be given by **John Quintanal** of USANA Health Sciences.

ASSOCIATE LUNCHEON:

Grab an associate or two and meet us for lunch at Girasole on May 10 at 12:00pm.

Tickets for lunch will be \$7 for members and \$13 for associates.

Marriage & Family Therapist, Jim Moog will be our motivational keynote speaker.

Call Cristin at 485-1394 for more information and to sign-up.

(Please note: *there will be no morning meeting on May 10*)

VALUE:

Jason Cooke of Herrmann Financial Services sights the obvious value of the association as being increased business and the relationships formed, but what he has gained through membership in the TVEA is an increased familiarity with the Tri-Valley area. Being from

Walnut Creek, this gives him the opportunity to be a part of another community.

DID YOU GIVE A REFERRAL THIS WEEK?

WELCOME BACK!

Jim Bowen of Pleasanton Auto Repair has just returned after a three-week trip to London, Egypt and Africa, and he has some great stories; ask him about the rhino ☺ Welcome back, Jim!

CLASSIFICATION:

Beverly Hoey was born and raised in Cleveland, Ohio by Czechoslovakian immigrants. She moved to Oregon to attend the University of Oregon, where she met her (now ex-) husband from the Bay Area. She graduated with a Masters in European History. She also has an MBA with a focus on taxation. She then received her J.D. from Golden Gate University and started practicing law in 1984.

Beverly was a tax attorney for a couple of years, then focused on commercial real estate for the next five years, working for Grubb & Ellis. Back then, she found that the industry was a "good ol' boys" group, making it difficult for any woman to succeed.

In 1989, on a wing and a prayer, she started her own practice with only \$10,000. She became a tax expert in estate planning and real property law, all the while continuing her professional education. Past Pleasanton City Attorney, Peter MacDonald sent her contract work and other referrals, and has now become an established, although still struggling, attorney.

She has sat on the Eastern Alameda County Board of Associates for 12 years, was past president of the Eastern Alameda County Bar



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Association, was past president of the Tri-Valley Estate Planning Counsel, has served as a Rotarian for 14 years, has been on the Board of Directors for Keystone (benefiting severely disabled adults) for 16 years, and is now on the Board of the Pleasanton Center for the Arts Foundation.

She has one daughter named Shannon that works for her, and she enjoys painting, bicycling, gardening and traveling.

Beverly Hoey specializes in estate planning. Setting up a trust is not just a simple document. Along with setting up a trust, she would combine it with a durable power of attorney, advanced health care directives, and a pour-over will. If created properly, one can avoid conservatorship, which can be very costly.

California is a Community Property state, meaning that property transfers to the surviving spouse upon ones death. However, when the surviving spouse passes or both pass simultaneously, their estate valued at \$1.5MM or more (easily attainable in this area) is subject to 55% estate tax rate and would go through a lengthy probate process.

As a trust administrator, Beverly would handle paying creditors, paying taxes, funding sub-trusts and getting date-of-death appraisals after one passes. She would also take care of the bypass trust, which would be set up for 50% of the community property (up to \$1.5MM) and/or if one spouse had separate property. Trustees can be adult children or a fiduciary.

Something to remember:

Wills are public records, whereas trusts are private, keeping outsiders from obtaining your asset information.

To talk to Beverly about setting up your trust or other business agreements, like a LLC, call her at 847-0880.

OPEN CLASSIFICATIONS:

Graphic Artist
Office Equipment Sales/Service
Electrical Contractor
Architect
Bank

ON THE COUCH WITH JIM MOOG, MFT:

Our SELF WORTH is made up of our sense of belonging, our sense of competency and our sense of worth.

Our **sense of belonging** is developed (or not) through the marriage of our parents. If we did not develop it from our parents marriage, we can develop our sense of belonging from groups, like the TVEA.

Our **sense of competency** is developed (or not) through our parent of the same sex. If we did not develop it through our parent of the same sex, we can develop our sense of competency through hobbies and interests.

And lastly, our **sense of worth** is developed (or not) through our parent of the opposite sex. If we did not develop it through our parent of the opposite sex, we can develop our sense of worth through our spirituality and from complimenting qualities of character in others.

TVEA WEBSITE:

The Tri-Valley Executives' Association can now be found on the web at:

www.trivalleyexecs.org

and

www.trivalleyexecs.net
