
MAY 21, 2009

NEXT WEEK:

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

You will be GREETED by **Darlene Crane-Peel** of Residential Pacific Mortgage and **Dave Silva** of Silmar Flooring.

LEAD CHALLENGE: **Manny Martin** will give a lead to, sing to or visit the business of **Bob Olsen**.

Our CLASSIFICATION will be given by **Dave Silva** of Silmar Flooring.

OPEN CLASSIFICATION:

After 14 years in the group, our beloved Chiropractor, Dr. Rick Hume has decided to resign. Running his practice, raising 2 teenagers and 2 step-children, having a new wife and expecting twins will be keeping him busy in his spare time.

If you know of a good **Chiropractor** who could benefit from membership in the TVEA, please invite him/her to a meeting.

SOCIAL COMMITTEE:

We are looking to try some new events this year; ones that can include more members, such as an A's or Giants game, a bocce ball tournament, or a wine tour. Attached is a **ballot** to see what the group as a whole is most interested in doing in the coming months. If you did not fill one in at the meeting, please take a moment to "vote" and send it back to Cristin at 736-4522.

DID YOU GIVE A REFERRAL THIS WEEK?

TVEA TEAM FOR ROTARY 5K:

Mona Fox are working on putting together a team to run/walk the father's day 5K (10K if you're really ambitious), benefitting the Pleasanton Rotary Scholarship Foundation. The "race" starts at the Pleasanton arch, goes around the Fairgrounds, and past Jan Batcheller's house.

More info. and sign-ups to come.....

MARKETING TIPS:

BY DR. ENDRE SELMECZY

- Keep track of the origin of new business: direct mail, yellow pages, radio, TVEA, internet, customer referral. This will help you to make decisions on where to best spend your advertising dollars.

- Talk to your friends and associates about your business in order to keep yourself in the front of their minds for word of mouth referrals.

- "Mystery shop" your own front office to make sure your best foot is forward, that your staff is representing you the way you like to represent yourself (or better!)

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.

His mother was a great influence on his life. She was very involved in his activities, like being his den mother and coach. Having a brother that was 3 years younger, his mother challenged him to finish college in three years. Majoring in Poly Sci, he graduated from Long

Beach State in just three years, 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 has two children, loves challenges and participates in many outdoor activities including triathlons, marathons and bike races. Cool things he's done: worked on the floor of the Stock Exchange, was the spokes model for TD Ameritrade, has competed in 3 Ironman triathlons and has completed a 50-mile run.

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.

They started out as stockbrokers, but developed into financial planners, becoming certified financial planners and have been in Danville for 20 years. They have 11 staff members and Jason, with the firm since 1995, is now a partner.

Herrmann Financial offers financial analysis and comprehensive financial plans to help reach your long-term goals and objectives. They can be conservative or aggressive, but urge their clients to diversify their assets to achieve their goals, and in this economy, mitigate loss.

Their focus is on helping people make the right financial decisions for their particular set of needs. There are two types of planning:

quantitative - gathering assets, and qualitative - looking at life goals and how to achieve those goals financially. Jason provides comprehensive financial planning that looks at one's needs, mind, body and soul. He takes managing peoples' life savings very seriously.

From October of last year on has been a very difficult time for everyone. It has been particularly hard to see the effects on the elderly, who had counted on their investments as their retirement income, many of whom have had to get jobs just to survive these trying times.

Going forward, the state of the economy will be determined by the unemployment rate. If it gets to 9-10%, then full employment won't be back up until approximately 2013 at which time the market will be considered to have turned around. We will likely see higher interest rates due to inflation. The best buy right now are equities, also known as stocks, which are relatively cheap right now.

It is very easy to set up an account and to transfer your assets all electronically. Just contact Jason to get started: 831-0200 jason@herrmannfinancial.com.

NEW MEMBERS:

Classification: Security - Systems & Monitoring
Firm: R N Security Company
Represented by: Rich & Linda Notzon
Address: 1520 W. Winton Ave. Hayward 94545
Phone: 510-786-2767, Fax: 510-786-2761

Classification: Attorney - Estate Planning
Member: Law Office of Jay Woitke
Represented by: Jay A. Woitke & Sandra Kelly
Address: 20320 Redwood Rd. Castro Valley
Phone: (510) 881-5026
E-Mail: jay@woitke.com
