
SEPTEMBER 16, 2010

THIS WEEK:

The **next meeting** of the Tri-Valley Executives' Association will be held on **September 23** at Vic's All-Star Kitchen at 7:00am.

GREETERS will be **Allen Eddy** of Cal Coast Plumbing and **Mona Fox** of Design Works..

The VALUE will be given by **Mona Fox** of Design Works..

General Contractor, **Phil Maser** of The Maser Company will be giving his CLASSIFICATION talk.

BROCHURES:

It's time to update our brochure! Please let Cristin know if you have any **changes** to your listing.

THE WEEKLY "POT" REPORT:

TVEA's 50/50 raffle is up to **\$136.00** with **only 3** marbles left: white = \$5, blue = \$10, red = \$ the POT!

QUARTERLY DUES:

The invoices for the fourth quarter have been emailed to you. Pay by October 15th and save \$25!

VALUE:

Manny Martin of Amador Valley Property Management has been a member since 1998. The Value of the Association is the people: good people he can count on, which makes his company look good.

NEW BOOK:

In January (wanted to give you all enough time to read this one) we will be discussing the ideas presented in

the book **Rework** by Jason Fried & David Hansson. The book presents itself as having new insights on business and what we do in our businesses day to day.

SOCIAL: NEXT WEEK!

Bocce anyone? We have scheduled our third TVEA **Bocce Tournament** next Thursday, September 30th at Campo di Bocce in Livermore.

The tournament will begin at 6:30pm followed by a classic spaghetti dinner at 8:00pm. The cost will be \$50/per person and will include dinner.

This will be a great event to bring your spouse, your associates or your **prospective members**. Sign up with Cristin ASAP!

There will be **NO MEETING next week: September 30th**.

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. He is currently

coaching cross-country for St. Mary's CYO and is a den leader for his 7-year-old son's Boy Scout troop. And this year, he brought back the run benefiting education in Walnut Creek (formerly a part of the Walnut Festival), in which over 1,000 people participated. Other 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 is a fee-based firm (as opposed to commission-based) and manages over \$250,000,000 for approximately 450 families. They offer financial analysis and comprehensive financial plans (including recommendations for life insurance, estate planning and accounting) 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.

The main question every investor, and person for that matter, has to ask him/herself is whether or not you are

increasing your purchase power over time with the objective being not to run out of money.

The current economy is stagnant; there is not much lending and no new jobs. Fortune 500 companies are just "sitting" on their money because of the uncertainty caused by the new taxes and health care plan. Typically, small businesses lead the way out of recession, but that has been difficult because they need to borrow money to grow and create new jobs, which again is not happening due to the lack of lending. Unfortunately, the way out of recession is inflation, which should be at about 4%; it is currently 1%.

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 MEMBER: WELCOME!

Classification: Insurance – Medical/Dental

Member: Raney Insurance

Represented by: **Jerry Raney**

Address: 5994 W. Las Positas #107, Pleasanton 94588

Phone: (925) 469-9000, *Cell:* (925) 895-4335

E-mail: jerry@raneyinsurance.com

Website: raneyinsurance.com
