
FEBRUARY 16, 2012

NEXT WEEK:

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

GREETERS will be **Dave Silva** of Silmar Flooring and **Dave Parker** of Edward Jones.

The SPOTLIGHT will be on **QES Computers** by **David Sanchez, Jr.**

Dave Silva of Silmar Flooring will give the CLASSIFICATION.

ELECTIONS:

Elections are rapidly approaching. We need **2 new nominees** for the Board of Directors. Membership elections are in March to replace outgoing members: Joey Minahan and Mike Peel. Anyone...*please*...?

Please let Cristin or one of our current members know if you are interested in helping out.

SPOTLIGHT:

BY MIKE WALLACE

Jay Woidtke has had his practice, The Law Offices of Jay A. Woidtke, for 33 years. He specializes in Estate Planning, and also handles property issues, sale of businesses and formation of business entities. However, litigation is something in which he does not get involved and will refer out.

Jay is a perfectionist with good values and morals. He takes pride in his work and has a passion for his clients.

To set up your trust or make sure your trust is in order, call The Law Offices of Jay A. Woidtke at 510.881.5026.

POT REPORT:

TVEA's 50/50 raffle is at \$52.00.

DID YOU INVITE A POTENTIAL MEMBER TO THE MEETING THIS WEEK?

CLASSIFICATION:

Gary Smith graduated from Oberlin College in Ohio in 1970 with a degree in Physics. Oberlin is also where he met his wife of that past 40 years. Gary got his PhD in Physics in 1977 from UC Berkeley. He then started working as a Physicist at Lawrence Livermore National Lab.

In 1977 he and his wife bought their house in Pleasanton, which is where they still live today. And in 1978 they had their son. Gary's community activities have included service on the Boards of the Foothill High School Band Boosters, the Pleasanton Adult Sunday Soccer League, and the Tri-Valley Estate Planning Council. He spends time caring for his wife, who suffers from MS, and in his spare time he enjoys photography and traveling, most recently to the Galapagos Islands.

After working for the Lab for nearly 20 years, Gary decided to make a bold move into the financial world and started Pleasanton Financial Advisors.

His clients can be assured that Gary will give them the same advice that he'd want to get. He has worked on developing strong analytical and computational skills that are helpful in assessing issues that arise in client situations. His 30 years of experience as an investor have led to a disciplined, long-term approach to managing client assets.

Gary knew that a team would be the best way to serve clients, which is why he originally used the plural "Advisors" in his company name. In July of 2000, Gary moved into an outside office and formed the LLC. **Mark Janer** was the first CFP to join Gary in 2001, then **Bronwyn Shone** in 2004, and **Richard Gross** in 2006. In

2007 they had outgrown their space and expanded their offices. They currently have 6 staff members and will be adding more support staff in the near future, as their retainer business has experienced a 13% increase over last year.

There are 60,000 Certified Financial Planners in the US, four of which are CFPs for Pleasanton Financial Advisors; in general, financial planning offices have two at most. Advisors go through extensive training and testing to achieve their certification.

Pleasanton Financial Advisors receives fee-only compensation, not commission. They have no affiliation with any broker or dealer, which avoids any conflict of interest. Less than 7% of financial planning companies are fee-only; most take an annual fee equal to 1% of your total assets. Your Pleasanton Financial Advisor will look at your current financial situation and based on the complexity of the necessary plan will determine the fee using an algorithm written by Gary Smith. A ball-park fee for just an analysis without managing the assets would be around \$1,000.

They provide comprehensive financial management and expert guidance and advice to families, individuals and some businesses in order for them to achieve their financial goals to support the future that they see for themselves. Pleasanton Financial Advisors uses sophisticated software to track portfolios and provide their clients with quarterly Financial Health Snapshots, which can be used to make adjustments toward their goal.

They are called on most often when key events occur: job change, birth, retirement, death, etc. New clients are coming from internet searches as well as referrals from existing clients. Pleasanton Financial Advisors does webinars every 6 months to educate clients and potential clients.

If you or someone you know needs their financial health reviewed, call Gary, Mark, Bronwyn or Richard at Pleasanton Financial Planners:

(925) 846-3768 advisors@pleasantonfinancial.com

SOCIAL MEDIA- HELPFUL LINKS:

- <https://biz.yelp.com/> to claim or set-up your business
 - <http://www.yelp.com/> to write a review for any business
 - <http://www.linkedin.com/> to connect with colleagues, associates, potential clients
 - <http://twitter.com/> to send information instantly with your followers or get information tweeted by a those in your industry
 - <http://www.facebook.com/business> to interact with your fans, get to know potential customers
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