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**FEBRUARY 21, 2013**

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**NEXT WEEK:**

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

GREETERS will be **Sheri Facciolla** of Patriot Pest Management and **Dan Brown** of Onstad's Insurance.

The SPOTLIGHT will be on **Tiger Carpet Cleaning** by an **advisor** at Pleasanton Financial Advisors.

The CLASSIFICATION will be a given by Joey **Minahan** of The Door Doctor.

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**SPOTLIGHT ON THOMAS WATCH REPAIR:**

BY SHERI FACCIOLLA

Thomas Tong got his training in watch repair as an apprentice of his friend, also a Watch Repairer, which lasted 2 ½ years. Thomas has been a Watch Repairer for 5 years, and his wife has just started her apprenticeship, taking place in Florida over the next two years. In addition to watch repair, **Thomas Watch Repair** also sells fashion watches. In 2011 Thomas Watch Repair opened their shop on First Street in Pleasanton, which is open from 9:30am-5:30pm Monday through Friday. To have a watch repaired or to refer someone to Thomas Watch Repair, contact Thomas Tong (925) 872-0108, 4625 1<sup>st</sup> St. Pleasanton, [thomaswatchrepair@gmail.com](mailto:thomaswatchrepair@gmail.com).

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**GUEST BREAKFAST:**

**NEXT WEEK, on Thursday, March 7<sup>th</sup>**, we will be having a Guest Breakfast. This is to give potential members an exact date rather than an open-ended invitation.

Any prospect that fills out an application for membership on that day will have their initiation fee waived.

A printable invitation is attached for you to forward or hand out to your prospects.

The member who brings in the most new members in one year, will have dues waived for one quarter (a tie splits the dues equally).

All members who bring a guest (to any meeting) will have fines waived for that meeting.

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**THE WEEKLY "POT" REPORT:**

TVEA's 50/50 raffle is at **\$56.00** with 9 white marbles (\$5), 2 blue (\$10) and 1 red (winner takes all).

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**BABY GIFT:**

Thank you to everyone who was able to contribute to the gift for Laura's baby boy (Laura is the server that we have usually every week at Vic's and who caters to all of our special needs). We were able to get her a \$100 gift card to Babies-R-Us and an educational toy.

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**CLASSIFICATION: PLEASANTON FINANCIAL ADVISORS**

**Gary Smith** was born and raised in Palo Alto CA. He was always interested in numbers and as a teenage fan of the SF Giants, he combined his interests by making a large wall chart on which he tracked the progress of each team in the National League, whose position was determined by computing its "magic number"; the chart reflected how close each team was to winning the pennant.

He graduated from Oberlin College in Ohio with a degree in Physics. Oberlin is also where he met Peg, his wife of that past 42 years. Gary got his PhD in Physics in 1977 from UC Berkeley. He then started working as a Physicist at Lawrence Livermore National Lab where he was in the same long-term research project the entire time.

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, who is married and living in Portland Oregon.

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. In 1996 he began with 1 client and gradually grew to a level of clientele that requires 6 staff members.

Gary always 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. Their principles, which have been unchanged in 16 years, are 1. To establish trust by doing great work, always acting with integrity, 2. Advice is the same as he/she would like to receive, 3. Take a comprehensive view of the client situation in order to give correct advice.

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. 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.

The mission of Pleasanton Financial Advisors is to provide objective, expert advice and guidance to assist individuals and families to achieve financial and life goals.

They are called on most often when key events occur: job change, birth, retirement, death, etc. The size of their clientele has been growing rapidly, serving 84 households at the end of 2012, a 23% increase over 2011. They don't classify clients according to how much money they have; instead they think about the client goals and what needs to be done to achieve them over time.

If you or someone you know, whether just starting out or preparing for continued retirement, needs his or her

financial health reviewed, call Gary, Mark, Bronwyn or Richard at Pleasanton Financial Planners:  
(925) 846-3768 [advisors@pleasantonfinancial.com](mailto:advisors@pleasantonfinancial.com)

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**NEW MEMBER:**

*Classification:* Insurance – Supplemental Disability

*Member:* Aflac

*Represented by:* **Dorn Driggs**

*Phone:* (925) 895-4805

*E-mail:* [dorn\\_driggs@us.aflac.com](mailto:dorn_driggs@us.aflac.com)

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**DID YOU INVITE A POTENTIAL MEMBER TO THE 3/7 MEETING?**

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