
AUGUST 29, 2013

NEXT WEEK:

The **next meeting** of the Tri-Valley Executives' Association will be held on **September 5th** at Vic's All-Star Kitchen at 7:00am.

GREETERS will be **Joey Minahan** of The Door Doctor and **Kathy Lorenz** of The Healing Journey.

The SPOTLIGHTs will be on **Diablo Valley Benefits** by **Pleasanton Financial Advisors**.

The **Lawrence Ling** of QES Computers will be giving the CLASSIFICATION.

UPCOMING CLASSIFICATIONS:

9/19 – Joey Minahan of The Door Doctor

9/26 – Phil Maser of The Maser Company

LOOKING FARTHER AHEAD:

10/10 – Membership/Guest Breakfast

DID YOU INVITE A POTENTIAL MEMBER TO THE MEETING?

SPOTLIGHT:

BY KATHY LORENZ

The Law Office of Jay A. Woidtke has been a solo practice for 33 ½ years out of the 34 years that Jay Woidtke has been an attorney. First practicing Environmental Law and from then on, Estate Law, Jay enjoys conflict resolution. He has been certified by the State Bar of California as an Estate Planning, Trust & Probate Law specialist. A lot of money can be saved for not a lot of money upfront. Good referrals for Jay are those who purchase real estate and those with elderly parents. To contact the Law Office of Jay A. Woidtke, call 510-881-5026 jay@woidtke.com.

THE WEEKLY "POT" REPORT:

This week, the TVEA's 50/50 raffle is at **\$63.00** with 6 white marbles (\$5), 1 blue marble (\$10) and 1 red marble (winner takes all).

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.

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.

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

CFPs 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. 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.

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. They help people protect themselves from their own counterintuitive nature in an emotional marketplace. They ensure that their clients' portfolios are well diversified and that they identify and mitigate the risk of their investments. Pleasanton Financial Advisors provides their clients with quarterly Financial Health Snapshots, which can be used to make adjustments toward their goal. Currently, they have over 90 clients and manage over \$125 million in assets.

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

DID YOU GIVE A REFERRAL THIS WEEK?
