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**FEBRUARY 06, 2014**

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**THIS WEEK:**

The **next meeting** of the Tri-Valley Executives' Association will be held on **February 13<sup>th</sup>** at Vic's All-Star Kitchen at 7:00am.

GREETERS will be **Joey Minahan** of the Door Doctor and **Terry Johnston** of R&S Landscape.

**Dave Parker** will SPOTLIGHT **R&S Landscape**.

The CLASSIFICATION will be given by **Manny Martin** of Amador Valley Property Management.

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**SPOTLIGHT:**

BY MIKE PEEL

**Pleasanton Financial Advisors** is located at 1811 Santa Rita Road in Pleasanton. In 2013, David Blain of BlueSky Wealth Advisors acquired Pleasanton Financial Advisors. There are 4 Certified Financial Planners in the Pleasanton office as well as 4 in the North Carolina office. A Certified Financial Planner (CFP) is the highest professional certification mark for financial planners.

The majority of their 150 clients are located in the Tri-Valley. They have \$140,000,000 under management; their largest client having \$6,000,000 and their smallest having \$20,000.

Good referrals for Pleasanton Financial Advisors are those experiencing life changes: retirees, newly married, divorced, beneficiary of an inheritance.

For more information on how Pleasanton Financial Advisors can help you, go to [www.pleasantonfinancial.com](http://www.pleasantonfinancial.com), or by calling Richard Gross, Mark Janer or Bronwyn Shone at 846-3768.

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

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**THE WEEKLY "POT" REPORT:**

This week, TVEA's 50/50 raffle is at **\$120.00** with 3 white marbles (\$5 each), 2 blue (\$10 each) and 1 red marble (winner takes all).

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

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**DISCUSSION: IDENTIFYING PERSONALITIES OF POTENTIAL MEMBERS**

- Outgoing
- Sense of Humor
- Established Business

It takes a while to establish trust among members, and know that they have employees or that they themselves are people you can depend on. While some members are easy to refer, others have to be especially trustworthy to receive referrals, which may not be frequent.

The TVEA provides tremendous support to its business members. Different people will experience different benefits from their fellow members, not all of which are financial. It's important to set realistic expectations for what a potential member will get from the group.

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**ELECTIONS:**

It's time to choose a new Board. It's an easy gig – get involved!

Our President-elect is **Sheri Facciolla** of the Patriot Pest Management. If you are interested in getting more involved or want to know more how the organization works, please contact Cristin.

We'd like 2 or more new nominees for elections in March to replace outgoing members: Larry Brumm and Jerry Raney.

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**GUEST BREAKFAST:**

In 4 weeks, on **Thursday, March 6<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.

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

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**DID YOU GIVE A REFERRAL THIS WEEK?**

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**Open Classifications:**

Advertising – Direct Mail

**Advertising – Internet /Social Media**

Advertising – Newspaper

Advertising – Radio

Appliances – Sales & Service

**Architect**

Auto Dealer

**Bakery**

**Bank**

Boat – Sales & Service

**Bookkeeper**

Burglar/Fire Systems – Sales/Monitoring

**Car Wash**

**Caterer**

Cement Contractor

**Chiropractor**

Club (Country, Golf, etc.)

**Collection Agency**

Communications (telephone, wireless)

**Convalescent Home**

**Counselor/Psychiatrist**

Cyclery – Sales & Service

Dermatologist

Disc Jockey

Employment Agency

Event Center or Planner

Funeral Director

Furniture Repair

**Glass – Auto**

**Glass – Residential/Commercial**

**Glass Tinting – Auto/Residential/Commercial**

**Graphic Artist**

**Gutters – Sales & Service**

Hardware & Building Supplies

**Handyman/Home Repair**

Health Club

Hotel

**House Cleaning**

**Interior Designer**

Insulation Contractor

Investigator

**Janitorial Service**

Junk/Waste Removal

**Landscape Architect**

**Limo/Car Service**

Linen Supply & Service

**Liquor Distributor**

**Locksmith**

Manicurist

Masseuse

Medical Supply

Med Spa/Esthetician

Moving & Storage

Notary

Nursery

Orthodontist

**Party Rental & Supplies**

Paving Contractor

Payroll Company

Pet Groomer

Pet Shop & Supplies

**Photographer**

**Pool Supply & Maintenance**

**Pressure Washing**

Public Relations

Restaurant – Chinese

Restaurant – Coffee Shop

Restaurant – Ice Cream Parlor

Restaurant – Italian

Restaurant – Mexican

Restaurant – Pizza

Restaurant – Sushi

Restaurant – Fast-Casual

**Roofing Contractor**

Safes & Vaults

Secretarial Service

**Shredding Service**

**Signs**

Sporting Goods

Tailor/Seamstress

Tile Contractor

Title/Escrow Company

Towing Service

**Travel Agency**

Truck Rental

Tutoring

Uniform Service

Vending Machines

Veterinarian

Water Coolers & Service

**Web Design/Hosting**

Window Cleaning

**Wine & Spirits Distributor**

**Winery**