



Marin County Estate Planning Council

President's Message

To the members of the Marin County Estate Planning Council:

Our fourth dinner meeting of the current season is just under two weeks away. The **March 9** meeting will again be at our new location, the Four Points Sheraton in San Rafael. This time, we will be back in the Napa Room, unless we have a huge turnout as we did in January.

UPCOMING PROGRAMS

In our program for the Wednesday evening, **March 9**, meeting we will look at current global economic and market trends. Our guest speaker, Brian Pretti, Senior Vice President of Mechanics Bank and head of their investment management group, is probably familiar to many of you. Mr. Pretti brings his unique blend of humor and insight in his review of the “unfinished business” that lies ahead for the US and global economies and financial markets. You won't want to miss his presentation, if only to find out what the title “You Dream of Columbus” means!

Our final dinner of the year will be held on **May 11**. Our speaker then will be Dr. Joel Kramer, neuropsychiatrist at UCSF. His topic will be “Understanding Cognitive Changes in the Elderly.” Last November, I attended a similar presentation by Dr. Kramer and two of his UCSF colleagues and found it very informative and helpful in understanding how to approach clients or their loved ones who are exhibiting declining cognitive skills as they age.

WEBSITE INFORMATION

You can always find information about meetings and membership on our website, as well as links to other Councils in the area and resources that you may find useful. The membership directory is online in the members-only section of the site. To access the members-only portion of the site, enter our **username: mcepc** and **password: service**.

I look forward to seeing all of you at the meeting.

David Raub
MCEPC President

Marin County Estate Planning Council

March 9, 2011 meeting

"YOU DREAM OF COLUMBUS"

BRIAN PRETTI, MBA, CFA, CFP
MECHANICS BANK

BRIAN PRETTI is a Senior Vice President with the Mechanics Bank and heads the investment management group responsible for managing \$1.4 billion of client assets. He has been with Mechanics for 20 years and has been involved in the investment management business for 30 years. Brian current manages assets for high net worth individuals, qualified plan pension and profit-sharing accounts, trusts and charitable organizations.

Before joining Mechanics Bank, Brian and George Springman ran an institutional asset management firm, specializing in value-oriented equities, whose clients included the State of Oregon, City and County of San Francisco, and the Contra Costa Employees Retirement System. Prior to that, Brian worked for Transamerica Corporation as part of a three-person Corporate Financial Planning and Analysis team responsible for corporate-wide capital planning, forecasting and strategic competitor analysis.

Brian holds an MBA in Finance from SF State, a BS in Economics from USF, and a BS in Business Administration from USF. He is a Certified Financial Analyst and a Certified Financial Planner.

LOCATION: Four Points by Sheraton, 1010 Northgate Drive, San Rafael

5:30 p.m. – Social Hour

6:15 p.m. – Dinner

7:00 p.m. – Program

Please RSVP to Sherrill Schaefer, sherrill@mcepc.org or 415.381.3555 by **Friday, March 4 at 2pm**. The entrée will be sliced Tri Tip with a peppercorn and cognac sauce, seasonal vegetables, and mashed red skin potatoes. The vegetarian and vegan entrée will be grilled portobello sliced mushroom, with steamed asparagus and wild rice, and a fruit dessert. You may request a vegetarian or vegan meal when you RSVP.

To bring a guest: Notify Sherrill Schaefer, sherrill@mcepc.org by **Friday, March 4, at 2pm**. The guest fee is \$45.00, payable at the door by check or cash only.

74 Monterey Avenue, San Anselmo, CA 94960

Please remember to cancel your reservation if your plans change. If you RSVP that you are coming, then cancel at the last minute or simply don't show, we end up paying for your meal anyway. Please help your Board in our efforts to provide good meals and wine at a reasonable price.