

**The Marin County Estate Planning Council  
is proud to present**

**S. Timothy Kochis  
CEO of  
Aspiriant**

**“Alternative Investments”**

Tim Kochis, CEO of Los Angeles and San Francisco-based wealth management firm, ASPIRIANT, will discuss the role of "alternative investments" in client portfolios as return enhancers and risk diversifiers. He'll explain why global real estate, private equity, commodities, and even idiosyncratic/opportunistic investments have a proper place in prudent portfolios alongside the core holdings of fixed income and public equity.

Tim will also comment on ASPIRIANT's view of recovery in the economy and investment markets. The classic journalists' questions of "whether...and why?" are easy to answer. The tough ones are "where, how"...and especially..."when?"

**Wednesday, January 14, 2009**

**LOCATION:** Jason's Restaurant 300 Drakes Landing Road – Greenbrae

**5:30 pm – Social hour**

**6:15 pm – Dinner**

**7:00 pm– Program**

Menu: Green Salad with Garlic Ginger Vinaigrette,

Korean BBQ Shortribs (beef) with rice and vegetable. Dessert: Green Tea Sorbet

**Please Note: A vegetarian meal may be substituted ONLY if requested by Monday before the meeting. No substitutions will be allowed AT the meeting.**

**TO BRING A GUEST**, please notify Sherrill Schaefer, in David Raub's office, at SherrillSchaefer@raubrock.com (415) 381-3555.

Please provide Sherrill your guest's name, title and company for the name tag.

**Notification must be received no later than 10:00 AM on Monday, January 12th.**

## *President's Message*

To the members of the Marin County Estate Planning Council:

I hope each of you had a wonderful Holiday Season with family and friends.

I am very pleased to announce our January speaker—Tim Kochis, speaking on the place for “alternative investments” as return enhancers and risk diversifiers alongside the core holdings of fixed income and public equity. He will also comment on his view of the current market meltdown and perspectives on where we go from here.

Mr. Kochis has had an impressive career, leading the financial planning practices for Bank of America and for Deloitte & Touche prior to founding Kochis Fitz, a predecessor firm to Aspiriant. Tim has chaired all key credentialing and philanthropic organizations in the wealth management industry, and been included in Worth's listing of the country's Best Financial Advisers since 1994. Barron's ranks Tim among the “Top 100 Independent Advisors” in the US, and the San Francisco Business Times ranks him first among the top 25 independent Wealth Managers in the Bay Area. He has authored many articles and two books: *Wealth Management* and *Managing Concentrated Stock Wealth*. In 2006, Tim received the inaugural Charles R. Schwab **Impact Award** for outstanding leadership in the profession.

This month's bullet items:

- We have wine sponsors for our January and March meetings, leaving only the May meeting available for this fiscal year—contact Aviva if you are interested.
- We need more cooperation in members calling in guests by the 10 AM deadline the Monday before the meeting. The number of unannounced guests for our November meeting strained the restaurant's ability to properly provide for each attendee.
- It is an administrative burden to process the continuing education credits when attendees forget to sign in or sign in on the wrong form. Please take responsibility for signing in and using the correct form!
- If you noticed any errors in the roster, please bring it to our attention so it may be corrected. Additional copies will be available in January if you missed getting one.
- The speaker evaluations are very helpful and only take a moment to complete. Please respond to the email request to submit your evaluation.

I look forward to seeing each of you at Jason's on January 14<sup>th</sup>.

Douglas G. Paul  
President

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**Please mark your calendars with our upcoming meetings!**

**March 11, 2009**

**May 13, 2009**