San Francisco
Estate Planning Council

Date:	**Wednesday, May 20, 2009**
Location:	**The Omni Hotel, 500 California at Montgomery, San Francisco**
Time:	**5:30 PM No Host Bar; 6:00 PM Dinner**
Topic:	**“The Family Wealth Paradigm”**
Speaker:	**Thomas C. Rogerson, BNY Mellon Wealth Management**

Tom Rogerson is a managing director with BNY Mellon Wealth Management. He has more than 25 years of experience in the financial services industry.

Tom has worked with top U.S. law, accounting, insurance and investment firms educating, motivating, and training their employees, prospects, and clients on family issues around wealth and how to integrate it into their financial planning. He continues to be invited to speak to wealthy individuals, business owners, and board members of universities, hospitals and charitable organizations throughout the country. He also has been invited to speak at numerous family meetings of some of the wealthiest families in the country. Tom is rated as one of the top speakers in the country.

Continuing Education Credit:
MCLE: The San Francisco Estate Planning Council is a State Bar of California approved Provider.
CPA & CFP®: A sign-in sheet and an attendance certificate are provided at each meeting.

Excused Absence:
Members can request an excused absence by mailing a letter, or sending an email (association_office@att.net) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.

San Francisco Estate Planning Council Reservation for May 20, 2009

Member Name ____

Guest Name____

Reservations and cancellations must be received by Monday, May 18th, by 1:30 p.m.
to be assured of a dinner or refund, respectively.

Please pay online with a credit card - www.acteva.com/go/sfepc
Or send your check to “SFEPC” at the address below

Mail In Registration: $60 per member; $65 per guest
At the Door (reservation still needed): $65 per member; $70 per guest

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