

President's Message

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As we end the first quarter of 2018, now is a good time to reflect on how the year has started and discuss what lies ahead.

For the first meeting of the year, we had Dan Staszak, CPA, MS (Tax) discuss the tax reform legislation that was passed in 2017. Mr. Staszak did a tremendous job of making tax law interesting, funny and understandable. We had near record attendance for the meeting.

The February meeting was presented by Tom Wolfrum, Esq. and Peter Langley, Esq. They discussed the nature of premarital agreements. One take away from this meeting was that premarital agreements are something planners should be discussing with many of their clients, but generally do not. Also, during February, we had our first study group. Our Pro Bono director, Landon Tymochko, graciously hosted the group in his Folsom office. The group discussed longevity risk, and how CFP® practitioners are adjusting their retirement and income models to incorporate longer life expectancy.

We finished February with a joint mixer (see picture) along with the Sacramento Estate Planning Council. Our longtime strategic partner, Doug Bertsch, generously sponsored the mixer. Thank you Doug Bertsch for making our first mixer for 2018 so much fun!

March started off with Advocacy Day. Advocacy Day provides us the opportunity to directly discuss legislative issues with the people writing the laws. One topic that we discussed with our legislators was our opposition to the Services Business Tax, which would apply to most of us. We also had the opportunity to bring awareness of what a CFP® is, and what it means to be a fiduciary.

For our March general meeting, we had Ken Unger, with the Academy of Preferred Financial Advisors. Ken spoke to us about "The Keys to High Level Production". He stressed the importance of time management and ongoing client communication as key differentiators for thriving practices.

Looking forward to the next 3 months, we have some exciting programs, a mixer, and a study group lined up. Our regular April meeting has been changed to a social mixer on [April 19th](#). For our May 11th meeting, we will be returning to the Rancho Cordova City Hall at 7:30 a.m. Pete Constant from Retirement Security Initiative will be discussing pension reform.

If you have any ideas for speakers or topics, please reach out to me at matt@lucasplanners.com

I hope to see you soon!

