



**Elizabeth Palomeque** – *First Republic  
Private Wealth Management*

## **Effective Compassion: Techniques for Working with Grieving Clients**

We all know that major financial transitions come with major emotional baggage. Death, divorce, disability and retirement are just a few of the financial events that bring tears into our offices. Facing these emotions can be challenging for us as attorneys and as planners; for many of us, it's our least favorite part of the job. But there's an unparalleled opportunity here: if handled correctly, these experiences can create a real and lasting client/professional bond. Whether you are empathetically challenged or naturally empathetic, this session provides concrete tips for working with clients in transition... without becoming overwhelmed yourself.

**Libby Palomeque, CFP** has always been fascinated by emotions, both within the investment sphere and without. For that reason, Libby specializes in working with clients who are undergoing the “big life transitions” of death, divorce, and retirement. As a speaker, Libby seeks to address “difficult” topics in an enjoyable, practical manner; her personal goal is that each audience member leave with at least one practical tip that will immediately benefit their practice. In addition to her financial designations, Libby is also a Certified Grief Recovery Specialist, and is a level II Degriefing practitioner.

Libby is currently a Senior Managing Director and portfolio manager for First Republic Private Wealth Management.

In her personal life, Libby is a wife, a mother... and a competitive adult beginner figure skater. Last year, she was honored to represent the United States at the ISU Adult Figure Skating World Championships in Germany...where she won a gold medal.

Join us on **Wednesday, November 14, 2018** at 5:30 PM  
At the Omni Hotel - 500 California (at Montgomery) in San Francisco.

\$75 Preregistered Members      \$95 Preregistered Guests  
*At the door – Registrations still needed - \$80 members and \$100 guests*  
*Reservation needed by November 12, 2018*

Send a check with names to: SFEPCC – 767 Brannan Place – Concord, CA 94518

Or pay by credit card – <http://www.123signup.com/calendar?org=sfepcc>

If you or your guest requires a vegetarian meal, please send an email to: [sfepcc@astound.net](mailto:sfepcc@astound.net)

### **Continuing Education Credit:**

*MCLE:* This activity is approved for MCLE credit of one hour by the State Bar of California.

*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 ([sfepcc@astound.net](mailto:sfepcc@astound.net)) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.