FPA THE FINANCIAL PLANNING ASSOCIATION

# Northern California Regional Conference

**Day 1** Tuesday, April 26, 2005

## Tuesday

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| 7:30 | Registration | | | | | |
| 8:30 | **Opening Keynote** | **Ken Dychtwald**, author of *Age Wave*, on ***"Financial Wake-up Call: How Advisors can Help Baby Boomers Fulfill Their Personal Dreams"*** | | | | |
| 9:45 | Break | | | | | |
| 10:00 (2 CE) 1 hr 40m | **Social Security 301 –Straight from the Source** *Linda Zamfino*, Social Security Administration | **Technology & Growth** *JP Scandalios*, Franklin Templeton Technology Fund | **Wealth Transfer Strategies Today: Simple and Complex Alternatives** *Domingo Such*, Esq., McDermott, Will & Emery | **No Geeks Allowed: Office Technologies for the Rest of Us** *Gregory H. Friedman*, CFP® Friedman & Associates | **Working with Divorcing Clients and their Lawyers: from Ethics to Post Judgment Implementation** *Violet P. Woodhouse*, APC, CFLS, CFP® | **CEU Super Session** Attend only ONE Super Session for up to 15 hours of CA DOI credit & 15 CFP CEUs. *Compliments of Columbia Management.* *J. William "Bill" Cooley*, Success Continuing Education LLC; *Stephanie Owen* and *Annie Moberly*, Columbia Management |
| 11:45 | **Luncheon Keynote** | **Ed Slott**, IRAHelp.com, on ***"Building Your Practice with IRA Distribution Planning"*** | | | | |
| 1:45 (2 CE) 1 hr 45m | **Long Term Care, from a Planner's Perspective and Medi-Cal Asset Protection, from a Lawyers Perspective** *William M. Upson*, CLU, Strategic Asset Management Group; *Norman Macleod*, Attorney at Law | **Research Results on Active vs. Passive Portfolio Management** *Craig Israelsen*, Ph.D, Brigham Young University | **How to Make a Trust Company Your Friend: Preserving and Tending All the Wealth You Created for Your Clients.** *Jeffrey R. Lauterbach*, Capital Trust | **Hidden Tax Issues of Real Estate Transactions** *Kent Noard*, EA, CFP®, KLN Financial Group | **The One Thing You Need to Know from Each of Industry's Most Influential Coaches, Consultants and Visionaries** *Dave Drucker*, Drucker Knowledge Systems; *D Shannon*, The Experienced Advisor | **CEU Super Session** —Repeat Session Attend only ONE Super Session for up to 15 hours of CA DOI credit & 15 CFP CEUs. ***Compliments of Columbia Management.*** |
| 3:30 | Break | | | | | |
| 3:45 (1 CE) 50 min | **Deciphering MediCare & MediGap** *Linda Zamfino*, Social Security Administration; *Bonnie Burns*, HICAP | **Implementing Commodities In Your Investment Portfolio** *Jeremy DeGroot*, CFA, Litman/Gregory Analytics | **Managing Taxes: Restricted Management Accounts & Jumbo IRAs** *Jim Herrington*, CFP®, THE Financial Services NETWORK | **RIA Compliance: How to Avoid Getting Burned** *Lisa Roth*, ComplianceMAX Financial LLC | **How to Use Your PDA** *JD Whitaker*, DoubleVee Mobile Computing Solutions | **CEU Super Session** —Repeat Session Attend only ONE Super Session for up to 15 hours of CA DOI credit & 15 CFP CEUs. ***Compliments of Columbia Management.*** |
| 4:45 | **Closing Keynote** | **Susan Bradley**, Sudden Money Institute, on ***"What Clients Want from Their Financial Advisors"*** | | | | |
| 5:30 | **Networking Event & Dinner** to 8:00 | | | | | |

## Wednesday

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| 8:30<br>(3 CE)<br>2 hr 45m | **What in the World Will We Do with Mom and Dad?** —Resources for Elder Care Planning<br>*Linda Conti* and *Melinda McGlashan*, Pathways; *Mary Twomey*, *Dr. Tessa TenTusscher, Hanna Rasmussen*, Institute on Aging | **Working With New Wealth Clients—Integrating Interior and Exterior Finance with Scenario Software, Client Discovery and Communication Materials**<br>*Susan Bradley*, Sudden Money Institute | **Marketing & Tech Tips for Today's Advisor**<br>*Andy Gluck*, Advisors Site | **Transitioning a Practice: Do's & Don'ts from Advisors Who Have Been There**<br>*Dave Grau*, Business Transitions; *Dave Drucker*, Drucker Knowledge Systems.; *D. Shannon*, The Experienced Advisor; *Kristofor Behn*, Practice Merger Consultants | *Fundamentals Session*<br>**Starting And Running a Successful Financial Planning Practice: Begin with the end in mind**<br>*Kacy Gott*, CFP®, Kochis Fitz; *Elfrena Foord*, CFP®, CPA, Foord Van Bruggen & Ebersole; *Erin J. Kincheloe*, FSC Securities, Moderator | **No** CEU Super Session offered at this time |
| 11:15 | Break | | | | | |
| 11:30<br>(1 CE)<br>50 min | **Decision Rules & Portfolio Management for Retirees**<br>*Jonathan Guyton*, CFP®, Cornerstone Wealth Advisors | **The World According to Bob**<br>*Bob Veres*, Inside Information | **Effective Use of 1031 Exchanges, Reverse Exchanges, and Tenants In Common**<br>*Cecily Drucker*, Esq., 1031 Strategies & Services, Inc. | **Health Savings Accounts**<br>*David Crutcher*, Attorney at Law | **Writing a One-Page Business Plan**<br>*Jim Horan*, The One Page Business Plan Company | **CEU Super Session** —Repeat Session<br>Attend only ONE Super Session for up to 15 hours of CA DOI credit & 15 CFP CEUs.<br>*Compliments of Columbia Management*. |
| 12:20 | **Luncheon Keynote** | **Julie Morgenstern**, Professional Organizer, Author, Speaker on ***"Making Work Work"*** | | | | |
| 1:50 | Break | | | | | |
| 2:00<br>(2 CE)<br>1 hr 30m | **Decision Rules & Portfolio Management for Retirees: Putting It Into Practice**<br>*Jonathan Guyton*, CFP®, Cornerstone Wealth Advisors | **The Real World of Alternative Investments**<br>*Nick Delurgio*, CLU, Diversified Financial; *Paul J. Gire*, CFP®, Strategic Advisory Services, Inc. | **Financial Security for Non-Traditional Families**<br>*Harold Lustig*, CLU, ChFC, Lustig Financial Services | **Transforming Your Client's Relationship with Money & Life**<br>*Lynne Twist*, The Soul of Money Institute | **Managing Clients using Counseling and Communication Skills**<br>*Ira Fateman*, CFP®, SAS Financial Advisors, LLC; *Maurice Kamins*, LCSW, Futures in Recovery | **CEU Super Session** —Repeat Session<br>Attend only ONE Super Session for up to 15 hours of CA DOI credit & 15 CFP CEUs.<br>*Compliments of Columbia Management*. |
| 3:45 | **Closing Keynote** | **Ross Levin**, CFP®, Accredited Investors, Inc. on **"The Financial Planning Firm of the Future"** | | | | |
| 4:45 | Conference Dismisses | | | | | |