FPA
THE FINANCIAL PLANNING ASSOCIATION

Day 1 Tues. May 27

FPA NorCal Conference May 27–28, 2008 www.FPANorCal.org

7:30–8:30 **Registration, Continental Breakfast, and Networking**

8:30–10:00 **Opening Keynote** ***Janet Yellen**, President & CEO, Federal Reserve Bank of San Francisco* **The U.S. Economic Outlook and the Implications for Monetary Policy**

10:00–10:30 **Networking Break**

10:30–11:45 [1.5 CE]	**Advanced Strategies to Increase Effectiveness Approaching and Advising Real Estate Investors** *Rich Arzaga*, THE Financial Services NETWORK	**The Implications for Financial Planners of the Far-Right (Side of the Brain)** *Ted Klontz*, Ph.D., CSAC III Onsite Workshops	**Top 10 Great Ideas for Your Practice** *David L. Lawrence*, AIF,® *Financial Advisor* Magazine	**Managing Mortality Risk with Longevity Annuities** *Jason Scott*, Ph.D., Financial Engines	**Charitable Remainder Trusts: Creative Applications** *Erik Dryburgh*, Esq., CPA, Silk, Adler & Colvin	**Cultivating a Great Financial Planning Firm—Through Career Development Planning** *Mark E. Johannessen*,CFP,® Sullivan, Bruyette, Speros & Blayney, Inc.	**Compliance Mock Cross-Examination: How Simple Oversights Become Legal Time Bombs** *Tom Giachetti*, Esq., Stark & Stark; *Robert Veres*, Inside Information

11:45–1:15 **Luncheon Keynote** ***Tal Ben-Shahar**, Professor, Harvard University* **Positive Psychology: The Science of Happiness**

1:30–2:45 [1.5 CE]	**Creating a Strategic Plan for Yourself in 60 Minutes** *Anne Marie Smith*, 60 Minute Strategic Plan, Inc.	**Leading Edge Investment Practices** *Robert N. Veres*, Inside Information; *Bryce James*, Smart Portfolios, LLC; and *Paul Solli*, Aperio Group, LLC	**Advanced Concepts in Long-Term Care Insurance Planning** *Michael Kitces*, CFP,® MSFS, CLU, Pinnacle Advisory Group	**Understanding Changes in the Tax Law** *Sharon Kreider*, CPA	**Planning for Family Members of the Affluent with Special Needs** *Stephen W. Dale*, Esq., Dale Law Firm, PC	**Risk & Opportunities: A Current Look at Foreign Investing** *Jeremy DeGroot*, CFA, Litman/Gregory; *Theodore J. Tyson*, Mastholm Asset Management/Masters' Select International Funds	**The Special Challenges of Planning for Grandchildren** *Steven D. Anderson*, Esq., and *Sinclair Hwang*, Esq., Carr McClellan, Ingersoll, Thompson & Horn

2:45–3:15 **Networking Break**

3:15–5:00 [2 CE]	**The Anatomy of a Currency Hedge Fund** *Dr. Somnath Basu*, California Institute of Finance at Cal Lutheran University	**Private Equity Investing & LBO Funds** *Greg D. Anderson*, JD, CPA, Mount Yale Capital Group **Structured Products in a Post Sub-Prime World** *Powell Thurston*, PIMCO	**Integrating Technology Solutions: Creating Your Own Silver Bullet** *Greg Friedman*, CFP,® Friedman & Associates; *Chad Blythe*, MoneyGuide Pro; *Robert Powell*, Laser App; & *Dusty Huxford*, dbCAMS	**Myths and Truths about Socially Responsible Investing** *Lincoln Pain*, CFP,® AIF, Effective Assets	**Wow, I Didn't Know That! Advanced Uses of Trusts to Solve Client Financial Concerns** *Ray Sheffield*, Esq., LLM, Sheffield Law Office	**Investor Biases: Implications for Advisors** *Terrence Odean*, UC Berkeley, Haas School of Business	**Applying and Communicating Real-World Guardrails and Withdrawal Policies with Clients** *Jonathan T. Guyton*, CFP,® Cornerstone Wealth Advisors, Inc.

5:00–6:00 **Reception**

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Day 2 Wed. May 28

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7:30–8:30 Registration

8:30–9:45 Opening Keynote ***Burton G. Malkiel***, *Ph.D., Professor of Economics, Princeton University* **Investment Opportunities in China**

9:45–10:15 Networking Break

10:15–12:00 [2 CE]

Redefining Risk/Reward Through Fixed Income ETF's *Ron Ryan*, CFA, Ryan ALM, Inc.	**Everything You Need to Know about Preparing Your Practice for Sale and Successfully Finding and Negotiating with Your Ideal Buyer** *Mark Tibergien*, Pershing Advisor Solutions LLC; *Harman K. "Jet" Wales*, Moss Adams Capital, LLC; *Lela Jahn*, CFP,® Jahn Investment Advisors	**The Planning Process—Six Technology Opportunities to Create Efficiency** *David "Dusty" Huxford, Jr.*, dbCAMS/FCSI	**Pre-Medicare Health Insurance Planning for Baby Boomers** *James Holt*, CFP,® RHU, REBC, Holt Financial Services	**Crossroads: Making the Choices Today That Will Determine Your Business of Tomorrow** *Ross Levin*, CFP,® Accredited Investors, Inc.

12:00–1:00 Networking and Foundation Luncheon

1:15–2:15

Advanced Portfolio Management: Building Global, Multi-Asset Class Investment Portfolios *Katie Hall*, Hall Capital Partners, LLC	**How I Successfully Sold My Practice in 2007, a Case Study** *Lela Jahn*, CFP,® Jahn Investment Advisors; *Mark Tibergien*, Pershing Advisor Solutions LLC; *Harman K. "Jet" Wales*, Moss Adams Capital, LLC	**The Parent Care Conversation: Partnering with Geriatric Care Managers** *E. Tina Cheplik*, RN, BSN, Care Solutions; *Carolyn Rosenblatt*, RN, Esq., Help With Elders	**Don't Risk a Lot for a Little! An Advisor's Review of Advanced Property and Casualty Insurance Issues** *Holly Gilian Kindel*, CLU, CFP,® Mosaic Financial Partners, Inc.	**Social Security Tax and Benefit Planning: How to Optimize Your Client's Choices** *Karen Brosi*, CPA, Brosi Tax	**Business Communication Skills: Tips and Techniques to Outclass the Competition** *Syndi Seid*, Advanced Etiquette	**The Insurance Industry Today: In Search of Intelligent Life** *Bret Benham*, TIAA-CREF **Insurance CE SuperSession**

2:15–2:30 Networking Break

2:30–3:30

Philanthropic Case Studies: Adding Value to Your Clients' Philanthropic Intent *Nicole Taylor*, East Bay Community Foundation	**The Brick Wall: Helping Your Clients with the Emotional Challenges of Retirement** *Elizabeth A. Palomeque*, CFP,® CDFA, CGRS, First Republic Investment Management	**Four Steps to Successful Elder Care for Your Clients: Learn the Options, Resources and Pitfalls of This Challenging Process** *Susan Anderson* and *Roger Cormier*, MA, Cohen Cormier Geriatric Care Managers	**New Tax Laws and Other important Financial Considerations for Registered Domestic Partners and the LGBT Community** *Deb L. Kinney*, Esq., DIKLaw Group, PC	**Client Advisory Board Best Practices** *Roger Hill*, William Blair; *Gretchen Hollstein*, CFP,® Litman/Gregory; *Curt Weil*, CFP,® Lasecke Weil	**Advisor Communication: Defining Investment Strategies and Communicating Theoretical Concepts to Your Clients** *Jason T. Thomas*, Ph.D, CFA, Kochis Fitz/Quintile	**The Insurance Industry Today: In Search of Intelligent Life** *Bret Benham*, TIAA-CREF **Insurance CE SuperSession**

3:45–5:30 Closing Keynote and Prizes ***Greg Valliere***, *Chief Strategist, Washington Research Group* **2008 Elections—Implications for Investors**