FPA
Financial Planning Association

FPA NorCal Conference May 26–27, 2009

www.FPANorCal.org

May 26

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

8:30–10:00 **Opening Keynote** ***Roger Gibson**, CFP,® CFA, Gibson Capital, LLC,* **"Multiple-Asset-Class Investing: Is It Still Relevant in Today's Market?"** Opening Keynote 8:30–10:00

10:00–10:30 **Networking Break** Networking Break 10:00–10:30

10:30–12:00 [1.5 CE]	**The Power of PR in Your Marketing Plan** *Marie Swift* Impact Communications, Inc.	**The Great Deleveraging** *Andrew Barker* Artio Global Investors	**Rethinking Risk Tolerance** *Michael Kitces, MSFS, MTAX, CFP® CLU, ChFC, RHU, REBC, CASL* Pinnacle Advisory Group	**The Incorporation of Behavioral Finance Knowledge in the Design of Future Retirement Plans** *Som Basu, PhD*, California Institute of Finance, California Lutheran University	**Forensic Trust Administration: Fixing Unfunded Trusts and Unperformed Subtrust Allocations** *Peter Myers, Esq.* The Myers Law Firm, PC	**Financial Planning and Long Term Care Issues and Opportunities** *Cindy Eisenhower* John Hancock Long Term Care	**Mastering the Financial Planning Process: The Essence of the Annual Renewal Meeting** *Elizabeth Jetton, CFP®* RTD Financial Advisors

10:30–12:00 [1.5 CE]

12:00–1:45 **Luncheon Keynote** ***Paul Tiffany**, PhD, Senior Lecturer at the Haas School of the University of California, Berkeley* **"The Global Economy in the 21st Century: What Role for America?"** Luncheon Keynote 12:00–1:45

2:00–3:30 [1.5 CE]	**The Professional Referral Method** *Joe McLean* Alliance Bernstein	**Social Security Update and Review** *Karen Brosi, EA, CFP®* Brosi Tax	**Scams & Fraud: What You Should Be Aware of to Protect Yourself & Your Clients** *Michael Lafferty*, CA Dept. of Consumer Affairs; *Alan Kennedy*, SF District Attorney's Office; *Jodi S. Lerner*, CA Dept. of Insurance; *Andrew Roth*, CA Dept. of Corporations	**Insulating Your Clients from Volatility** *Rudy Aguilera* Helios	**What Kind of '-Flation' Will It Be, and How Do We Prepare?** *Bob Greer* PIMCO	**Understanding Today's Energy Markets and the Implications for Tomorrow's Portfolios** *Howard Dean*, Director of Acquisitions & Senior Reservoir Engineer, Reef Energy; and *Dan Sibley*, CPA, LLM, Reef Energy General Counsel	**The Expanding Role of CRM Software** *Erin Kincheloe* Junxure

2:00–3:30 [1.5 CE]

3:30–4:00 **Networking Break** Networking Break 3:30–4:00

4:00–5:15 [1.5 CE]	**Industry Leading Strategies in Recruiting for Retention: A Proactive Approach to Human Capital** *Kelli Cruz* Schwab Institutional	**Investing in Infrastructure: Meeting the Demands of a Changing World** *Aaron Visse, CFA* Kensington Investment Group	**Managing in Mayhem** *Bob Veres* Inside Information	**My Business Model for Serving the Middle Market: An Alternative Approach** *Richard Salmen, CFP®, CFA, CTFA, EA* GTrust Financial Partners	**Estate Planning in the New Financial Economy** *Ray Sheffield, Esq., LLM* Sheffield Law Office	**Issues in Recognizing and Dealing with Aging Clients' Competency or Diminished Capacity** *Dr. Elizabeth Landsverk*, ElderConsult Medical Associates; and *Erika Falk*, PsyD of the Elder Abuse Forensics Center	**Mission Critical Technology to Leverage Your Small or Growing Practice** *Ken Piper*, Piper Consulting Group; and *Jacob Schutt*, Parallel Advisors, LLC

4:00–5:15 [1.5 CE]

5:15–6:15 **Reception** Reception 5:15–6:15

May 27

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

8:30–9:45 **Opening Keynote** ***David Kelly**, PhD, Managing Director, Chief Market Strategist for JPMorgan Funds* **"Investing in an Economic Storm"** Opening Keynote 8:30–9:45

9:45–10:15 **Networking Break** Networking Break 9:45–10:15

10:15–12:00 [2.0 CE]	**Navigating the Growth Curve of Your Business** *Sandy McMahon,* Executive Forums of Silicon Valley	**Tax News for Financial Planning Professionals** *Sharon Kreider, CPA*	**Using Personal Risk Management to Help Protect Your Client's Wealth** *Jill Federico* Marsh Private Client Services	**Leadership: Professional Development from the Inside-Out and the Outside-In** *Jonathan Guyton, CFP®* Cornerstone Wealth Advisors	**Life and Death Tax Planning for Annuities** *Michael Kitces, MSFS, MTAX, CFP® CLU, ChFC, RHU, REBC, CASL* Pinnacle Advisory Group	**Health Insurance: Planning for Baby Boomers** *James Holt, CFP®, RHU, REBC* Holt Financial Services	**Financial Planning Software Showdown** *William Bissett, CFP,®* Pinnacle Advisory Grp; *Patricia Jennerjohn, CFP,®* Focused Finances; and *Sabrina Lowell, CFP,®* Mosaic Financial Partners, Inc.

10:15–12:00 [2.0 CE]

12:00–1:00 **Luncheon** Luncheon 12:00–1:00

1:15–2:30 [1.5 CE]	**Update on Financial Planner and Advisor Regulations and Audits** *Wendy J. Phillippay* Best Practices Consulting Group	**Beyond the 4% Rule: Using Market Prices to Guide Retirement Spending** *Jason Scott, PhD* Financial Engines, Inc.	**Finding the Planning in Financial Planning: Strategy-Making by Financial Planners** *Dave Yeske, CFP®* Yeske Buie	**Perceptions of Risk in the Bond Market** *Carl Kaufman* Osterweis Capital Management	**Estate Planning for Same Sex Partners in an Ever-Changing World** *Deb Kinney, Esq.* DLK Law Group PC	**Elder Care: How It Impacts Your Client, Your Business, and You** *Esther Koch* Encore Management

1:15–2:30 [1.5 CE]

2:30–3:00 **Networking Break** Networking Break 2:30–3:00

3:00–4:00 [1.0 CE]	**Building More Effective Client Relationships Using the Myers-Briggs® Type Indicator** *Jennifer Selby Long* Selby Group	**"By the Way, I Have Cancer": Working with Clients after Their Diagnosis** *Elizabeth A. Palomeque, CFP,® CDFA, CGRS* First Republic Investment Management	**The Future of the Hedge Fund Industry** *Anne Casscells, CFP,®* Aetos Capital; and *Jeff Shields*, Watershed Asset Mangement	**If Only You Understood: An Intimate Dialogue Between the Generations** *Denise Hughes*, Personal Financial Coach; and *Helga Hayse*, Financial Intimacy	**Planning Pitfalls and Potential Problems in Estate Plans** *Elizabeth Trutner, Esq.* Fraser, Hartwell & Trutner	**Ensuring Clients Live Life Their Way** *Linda Fodrini-Johnson, MA, MFT, CMC* Eldercare Services

3:00–4:00 [1.0 CE]

4:00–5:30 **Closing Keynote and Prizes** ***Erik Wahl**, The Wahl Group* **"Performance Under Pressure—Fuel For Your Creativity"** Closing Keynote and Prizes 4:00–5:30