FPA Financial Planning Association

40th Annual FPA NorCal Conference

May 29–30, 2012

DAY 1 TUESDAY MAY 29 — DAY 1

7:30–8:30	**Registration, Continental Breakfast, and Networking**					**Registration, Continental Breakfast, and Networking**	7:30–8:30
8:30–10:00	**Opening Keynote** ***Mellody Hobson***, *President and Chairwoman of the Board, Ariel Investments, LLC*, **"Shattering the Crystal Ball: Why Experts Are Wrong"**					**Opening Keynote**	8:30–10:00
10:00–10:30	**Networking Break**					**Networking Break**	10:00–10:30
10:30–12:10 2.0 CE	**Systematizing Client Withdrawals: Strategy and Implementation** *Norm Boone, CFP®*, Mosaic Financial Partners, Inc. *& Ross Levin, CFP®*, Accredited Investors, Inc.	**The New Age of Professional Financial Planners and How to Hire Them Successfully** *Caleb Brown, MBA, CFP®* New Planner Recruiting	**Modern Portfolio Theory 2.0** *Michael Kitces, MSFS, MTAX, CFP®* Pinnacle Advisory Group, Inc.	**What's the Damage? The Impact of Medicare on Retirement Planning** [Will be repeated Day 2 at 3:00] *Katy Votava, PhD* GOODCARE	**Client Acquisition in a Wired World** *Kathleen Pritchard, CRPC, ChFC, CLU* Legg Mason	**Super Trends: Opportunities and Threats for Our Clients and Our Profession** *Dennis Stearns, CFP®, ChFC* Stearns Financial Services Group	10:30–12:10 2.0 CE
12:10–1:45	**Luncheon Keynote** ***Dr. Laura Tyson***, *Professor of Global Management, University of California, Berkeley*, **"Election 2012—The Great Debate Around the Economy and Job Creation"**					**Luncheon Keynote**	12:10–1:45
2:00–3:15 1.5 CE	**Tax Stuff Planners Need to Know** [Will be repeated Day 2 at 1:15] *Mark Allen, CFP®, EA, & Noelle Allen, CPA* Allen & Allen LLP	**Lessons Learned: A Thirty Year Retrospective on Building a Successful Firm** *Alexandra Armstrong, CFP®* Armstrong, Fleming & Moore, Inc.	**How to Position Your Portfolios in a World of Unusual Political and Economic Risk** *Charles Blankley, CFA* Gemmer Asset Management LLC	**"What do you mean I am not covered?" Incorporating Personal Risk Management into a Financial Plan** *Dan Glunt* Fort Point Insurance Services, Inc.	**The *Real* Cost of Retirement Communities: A Comparison of the Equity, Non-Equity and Rental Business Models** *Elizabeth Krivatsy, Esq.* Estate Planning | Elder Law	**Top Apps for Financial Advisors** *Bill Winterberg, CFP®* FPPad.com	2:00–3:15 1.5 CE
3:15–3:45	**Networking Break**					**Networking Break**	3:15–3:45
3:45–5:15 1.5 CE	**Savvy Social Security Planning for Women** [Will be repeated Day 2 at 10:15] *Elaine Floyd, CFP®* Horsesmouth, LLC	**Implementing the Wealth Management Index** *Ross Levin, CFP®* Accredited Investors, Inc.	**Navigating the Global Bond Markets: How to Capitalize on Opportunities in the Emerging Markets and Avoid the Pitfalls in the Developed World** *Scott J. Weiner, PhD, and Vladimir I. Milev, CFA* Payden & Rygel	**Long Term Care Plan Design For The Affluent: A Customized Process to Maximize Benefits And Meet Individual Needs** *Debra Rauser, RN* Long Term Care Partners & Insurance Services	**Risk Management in Client Portfolios: Fads versus Facts** *John Osterweis & Carl Kaufman* Osterweis Capital Management	**Creating Efficiencies and Scale Using Integrations and the Cloud** *Eric Clarke*, Orion Advisor Services, LLC, *& Ken Golding*, Junxure	3:45–5:15 1.5 CE
5:15–7:00	**Reception: "Celebrating Making A Difference for 40 Years"**					**Reception: "Celebrating Making A Difference for 40 Years"**	5:15–7:00

DAY 2 WEDNESDAY MAY 30 — DAY 2

7:30–8:30	**Registration, Continental Breakfast, and Networking**						**Registration, Continental Breakfast, and Networking**	7:30–8:30
8:30–9:45	**Opening Keynote** ***Lupin Rahman***, *Executive Vice President, Emerging Markets Portfolio Management Team, PIMCO*, **"Are Emerging Markets Ready to Lead the Global Economy?"**						**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	**The New "Retirement": Career Planning for Boomers** *John Nelson, author,* What Color is Your Parachute for Retirement?	**"I Just Don't Have Enough Time": How to Defeat Daily Distractions Before They Derail Your Business** *Paul Kingsman* Paul Kingsman Company	**Recent Developments in International Financial Markets** *Andrew Rose, PhD* Haas School of Business	**The 10 Most Common (and Avoidable) Mistakes Estate Planning Attorneys Make & How Advisors Can Spot Them** *John Hartog, Esq.* Hartog & Associates, Inc.	**The Ongoing Evolution of Safe Withdrawal Rate Research** *Michael Kitces, MSFS, MTAX, CFP®* Pinnacle Advisory Group, Inc.	**How to Predict Human Reactions and Influence Outcomes to Increase Sales, Client Satisfaction and Productivity** *Matt Robinson* PsyMetrics Global	**Savvy Social Security Planning for Women** [Repeated from Day 1] *Elaine Floyd, CFP®* Horsesmouth, LLC	10:15–12:00 2.0 CE
12:15–1:15	**Networking Luncheon**						**Networking Luncheon**	12:00–1:00
1:15–2:30 1.5 CE	**Tips and Techniques for the Professional Power User** *Robert Veres* Inside Information	**Building a Great Firm: People, Culture, and Succession** *S. Timothy Kochis, CFP®* Aspiriant	**Navigating the New Fixed Income Landscape** *Matthew Tucker, CFA* BlackRock	**Settling an Estate: Roles and Responsibilities of the Financial Planner and the Estate Planning Attorney** *Peggy Cabaniss, CFP®*, HC Financial Advisors, Inc., & *J. Wesley Smith*, Buchman, Provine, Brothers, Smith LLP	**Effectively Implementing Technology: Your Leadership Is the Key** *Elizabeth Jetton, CFP®* Junxure	**Alternative Investments: How to Evaluate and Position in a Client's Portfolio** *Craig Kirkpatrick* Orinda Asset Management	**Tax Stuff Planners Need to Know** [Repeated from Day 1] *Mark Allen, CFP®, EA & Noelle Allen, CPA* Allen & Allen LLP	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	**Working with Grieving Clients** *Elizabeth Palomeque, CFP®* First Republic Investment Management	**Alliances: How to Become the Partner of Choice** *Darryn Pope* Level Four Group	**Customized Beta: The Marriage of Indexing and Active Management** *Patrick Geddes* Aperio Group LLC	**Conducting Family Meetings: Working with Seniors and Their Families** *Jim McCabe* Eldercare Resources	**Sales Presentation Skills to Capture Your Audience's Attention—and Their Business** *Jim Pomerance* Impact Speakers	**The Slippery Slope of Memory: Is My Client Cognitively Impaired?** *Karen Van Zino, MD*	**What's the Damage? The Impact of Medicare on Retirement Planning** [Repeated from Day 1] *Katy Votava, PhD* GOODCARE	3:00–4:00 1.0 CE
4:00–5:30	**Closing Keynote** ***Julie Foudy***, *Two-time World Cup Soccer Champion and Two-time Olympic Gold Medalist*, **"Building a Team to Make a Difference"**						**Closing Keynote**	4:00–5:30

www.FPANorCal.org