FPA
THE FINANCIAL PLANNING ASSOCIATION

FPA Nor Cal Conference

Day 1 Monday, April 3, 2006

Monday

www.FPANorCal.org

7:30–8:30 Registration

8:30–9:45 Opening Keynote — **Bernard Lietaer**, author of *The Future of Money,* **"Money and the Looming Dollar Crisis"**

9:45–10:00 Break

Time						
10:00–11:40	**Changes in Client Perceptions of Retirement and the Increased Need for Non-Financial Advisory Skills** J. Peter Lindquist, CSA, Life Puzzles, LLC	**Advising Holders of Stock Options and Concentrated Stock Positions** Kaye A. Thomas, Fairmark Press Inc.	**Asset Allocation Without Style Boxes** Robert Brown, CFA, PhD, GE Private Asset Management	**The Virtual Office and Outsourcing** Joel P. Bruckenstein, CFP®, CFS, CMFC, Virtual Office News	**Advanced Wealth Transfer Techniques** Domingo P. Such, III, McDermott Will & Emery LLP	**CEU Super Session** Presented by J. William "Bill" Cooley, Success Continuing Education, LLC, and sponsored by Lawrence Demarco, John Hancock Annuities *This session is offered multiple times; attend only once*

11:45–1:30 Luncheon Keynote — **Natalie Choate, "The Tax Pro's Guide to Stretch IRAs: Compliance Requirements and Planning Opportunities of the Minimum Distribution Rules"**

Time						
1:50–3:30	**Death and Taxes: How to Advise Executors and Beneficiaries on Estate Taxes, Disclaimers, Rollovers and Cleanup Strategies.** Natalie Choate, Esq.	**Maximizing Initial Withdrawal Rates: Decision Guardrails and Confidence Standards for a Monte Carlo Retirement** Jonathan Guyton, CFP®, Cornerstone Wealth Advisors, Inc.	**Social Security/Medicare, from Mystery to Mastery** Kathryn L. Garnett, Future in Focus	**A Lever to Move Your World: Hiring & Partnering with a Great Coach** •Tracy Beckes,Tracy Beckes and Associates, Inc.; •Gregg Clarke, CFP®, Willow Creek Financial Services; •Paul Murk, CFP®, Sequoia Planning	**Risk Management When Working with Older Clients** Susan Fleischer, LCSW, DCSW, CSWM, Rona Bartelstone Associates, Inc., Care Management & Home Health Care	**CEU Super Session** Presented by J. William "Bill" Cooley, Success Continuing Education, LLC, and sponsored by Lawrence Demarco, John Hancock Annuities *This session is offered multiple times; attend only once*

3:30–3:45 Break

Time						
3:45–4:35	**Identity Theft: Real Life Solutions** Amanda Welsh, PhD, Antics Online, Inc	**Current Trends in Disability Insurance** John Ryan, CFP®, RISC, Ryan Insurance Strategy Consultants	**Tactical Asset Allocation: Strategies for Avoiding Downside Risk and Adding Alpha** Paul Gire, CFP®, Strategic Advisory Services, Inc.	**Working with Difficult Clients—When All Else Fails** Ted Klontz, PhD, CSAC III, CET II, Onsite Workshops	**Financial Planning Implications of AMT** Michael Kitces, MSFS, CFP®, ChFC, Pinnacle Advisory Group	**CEU Super Session** Presented by J. William "Bill" Cooley, Success Continuing Education, LLC, and sponsored by Lawrence Demarco, John Hancock Annuities *This session is offered multiple times; attend only once*

4:45–5:30 Closing Keynote — **Gregory R. Valliere**, Chief Political Strategist, The Washington Research Group, **"A View from Washington"**

5:30–7:00 An Evening of Networking Roundtables and Tapas

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Day 2 Tuesday, April 4, 2006

Tuesday

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8:30–10:10	**Protecting Your Practice in an Ever-Increasing Regulatory Minefield** Thomas Giachetti, Esq., Stark & Stark	**Urge to Merge: Insights from a Sole Practitioner's Search for Partners** Dan Moisand, CFP®, Spraker, Fitzgerald, Tamayo & Moisand	**Learning from the Future: How Scenario Planning Can Help You and Your Clients Navigate the Extreme Change in the Next 20 Years** Dennis Stearns, CFP®, ChFC, MSFS, Stearns Financial Services Group	**Starting and Running a Successful Financial Planning Practice: Begin with the End in Mind** •Kacy Gott, CFP®, Kochis Fitz; •Elfrena Foord, CFP®, Foord Van Bruggen & Ebersole; •Erin J. Kincheloe, Moderator, FSC Securities	**Technology from the Trenches—Best Practices** Greg Friedman, MS, CFP®, Friedman & Associates	**Annuities Unwrapped** •Robert Gibson, CFP®, CSA, Gibson Capital; •Paul Knoblich, CFP®, CSA, CEPS, Paul Knoblich Retirement Planning; •David Beam, American Skandia/Prudential
10:10–10:30	Break					
10:30–12:10	**Succession Planning Strategies for the Financial Planner** David Goad, ChFC, Succession Planning Consultants	**International Investing: Is It Too Late?** Ranji Nagaswami, Alliance Bernstein	**Financial Planner as Change Agent: Life (a.k.a. "Change") Is What Happens While We're Planning** Guy Cumbie, CFP®, CIMC, CIMA, Cumbie Advisory Services	**The World According to Bob** Bob Veres, Inside Information	**The Paperless Office: Practical Tips for Making It a Reality!** Jo Day, Trumpet, Inc.	**CEU Super Session** Presented by J. William "Bill" Cooley, Success Continuing Education, LLC, and sponsored by Lawrence Demarco, John Hancock Annuities *This session is offered multiple times; attend only once*
12:15–1:45	**Luncheon Keynote**	**John Rogers**, Chairman & Chief Executive Officer, Ariel Capital Management, LLC, **"A Value Manager's Perspective on Today's Market"**				
2:00–2:50	**Financial Feeling: Managing Emotion and Communication in the Workplace to Avoid Burnout** Joy Koesten, PhD, University of Kansas School of Medicine	**Long Term Care: Assuring Your Clients' Choice, Independence, and Financial Security** Allen Hamm, Superior LTC	**How to Build a Fearless Brand** Robert Friedman, Fearless Branding	**Investment Strategies: Leveraging Tax Advantage Investments in Multimillion Dollar Portfolios** David L. Gemmer, CFP®, Gemmer Asset Management, LLC	**Energy Investment Panel** Gordon Dunne, Moderator, THE Financial Services NETWORK	**CEU Super Session** Presented by J. William "Bill" Cooley, Success Continuing Education, LLC, and sponsored by Lawrence Demarco, John Hancock Annuities *This session is offered multiple times; attend only once*
3:00–3:50	**Roth 401Ks and More—What Many Advisors Will Wish They Had Told Their Clients about Roth 401Ks and Qualified Plans During 2006** Ed Dillon, QKA, Polycomp Administrative Services, Inc.	**Get a Grip! Techniques to Anticipate the Unexpected and Keep Your Practice on Track** Lori Wood, LW Business Solutions	**Rolling the Dice with California Employees: Employment Shortcuts that Can Cost You the Business** Kim Silvers, SPHR, Silvers HR Management	**Taking Charge of Your Advisory Role in the Estate Planning Process** Elfrena Foord, CFP®, Foord Van Bruggen & Ebersole	**ESOPs: A Succession Plan that Combines Shareholder Liquidity with an Employee Benefit** Kyle Coltman, CEO, Menke & Associates	**CEU Super Session** Presented by J. William "Bill" Cooley, Success Continuing Education, LLC, and sponsored by Lawrence Demarco, John Hancock Annuities *This session is offered multiple times; attend only once*
4:00–5:30	**Closing Keynote**	**Nick Murray**, **"Income for Life: How 60 Million Baby Boomers Are Going to Outlive Their Retirement Income Unless You Stop Them"**				