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FPA of Ventura County
PO Box 188, Camarillo, CA 93011-0188
www.fpaventura.org (877) 281-0675

Friday, November 17, 2017

8:00 AM – Noon

SANTA BARBARA INN

901 E. Cabrillo Blvd., Santa Barbara, CA 93103

Exit the 101 freeway at Milpas Street. Head towards the ocean on Milpas till the street ends at Cabrillo Blvd.. Santa Barbara Inn is on the corner of Milpas and Cabrillo Blvd.

TAX AND FINANCIAL PLANNING IN THE MIDST OF A DIVORCE

presented by **Mark Prendergast, CFP®, CPA, CDFA™**

This presentation will address a range of financial planning concepts related to a divorce such as property settlement, spousal and child support, and near-term financial projections. It will also explore tax implications such as Internal Revenue Code Section 1041 and various California Family Law code sections as they relate to "support" and "property settlement" and estate documents. A case study will be included that demonstrates tax effects and negotiating strategies.

Mark Prendergast is director of tax strategies at Inspired Financial, a wealth management firm that focuses on Women In Transition. His primary focus is tax and estate planning as it fits into comprehensive financial planning . He worked as a CPA and Tax Manager at Price Waterhouse until 1985 when he made the transition to financial planning services, with an emphasis on "tax".

Complexity: Intermediate **/ Competencies:** Technical Knowledge, Relationship Skills **/ CFP Topic List:** Income Tax Planning and Retirement Planning **/ CFP CE Credit:** 1.0 hours expected

HER VOICE, HER LEGACY: HELPING FEMALE CLIENTS 'OWN' THEIR FINANCIAL FUTURE

presented by **Evelyn Zohlen, CFP®, President of Inspired Financial**

This interactive session explores why women often struggle to "find their voice" regarding their family's finances. It presents the concrete steps that financial planners can take to ensure that their female clients understand their finances, that they are understood by their team, and that their legacy intent is clear.

Evelyn Zohlen is the founder of Inspired Financial, LLC. ,a fee-only wealth management practice that specializes in serving women in transition. Previously, she was a Relationship Manager at The Vanguard Group. Evelyn serves on the Board of Directors of the Financial Planning Association. She is on the Advisory Board for the Center for Investments and Wealth Management at the UC Irvine and has served in a variety of community leadership roles including the Board of Directors for WomanSage

Complexity: Overview **/ Competencies:** Communication Skills **/ CFP Topic List:** Interpersonal Communications **/ CFP CE Credit:** 1.5 hours expected

REGISTER TODAY! Early Bird Discount ends Oct. 31 / Reservations deadline Nov. 14st Register online at www.FPAVentura.org or by phone **877-281-0675** and choose #1. Credit cards accepted online. Make checks payable to "FPA Ventura" and mail to PO Box 188, Camarillo CA, 93011. $45 for FPA members /$65 non-members **before Nov. 1st**. $50 members/ $70 non-members after Oct. 31. *(No refunds after Nov.. 14th.)*

"The mission of the Financial Planning Association of Ventura County is to strengthen and support the local community of those who are committed to financial planning as a practice and profession."