

*Our Mission: "The Financial Planning Association of Ventura County promotes the financial planning process and the CFP® designation through quality education and high ethical standards to benefit the financial planning profession and our community."*

**Friday, April 20, 2012**

**8:00 AM - 12:15 PM**

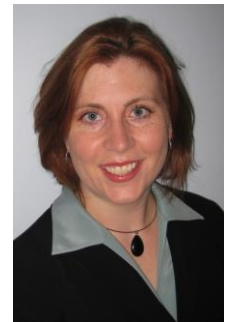
**LUNDRING EVENTS CENTER @ California Lutheran University**

**60 West Olsen Road, Thousand Oaks 91360**

*From the 101, take 23 North to Olsen Road. Go west toward the university. The Lundring Events Center is located within the Gilbert Sports and Fitness Center at the northwest corner of Olsen and Mountclef, adjacent to the swimming pool.*

**ESTATE PLANNING ISSUES AND STRATEGIES FOR CALIFORNIA DOMESTIC PARTNERS AND SAME SEX COUPLES** presented by **Elizabeth A. Bawden, J.D.**

Domestic partners and same sex couples face a complex and changing legal landscape that makes financial and estate planning confusing and challenging. As their advisors, it is important that we understand the estate planning needs. Discussion will include the specific gift and estate tax challenges facing California domestic partners and same sex couples and touch on recent income tax filing and reporting issues. *Ms. Bawden is a tax attorney specializing in estate planning, planned giving and tax exempt organizations. She is certified by the California Board of Legal Specialization as a legal specialist in Estate Planning, Trust & Probate Law, and is adjunct faculty at the UCLA School of Law teaching Estate and Gift Tax.*



**Career Stage:** II / **Competency:** Technical Knowledge, Critical Thinking / **CFP Topic List:** General Principles of Financial Planning, Income Tax Planning, Estate Planning / **CFP CE Credit:** 1.5 Submitted


**WHEN LOGIC LEAVES THE ROOM: HOW FINANCIAL DECISIONS ARE REALLY MADE AND WHAT WE CAN DO ABOUT IT** presented by **Ted Klontz, Ph.D.**

The basics of a healthy financial life are relatively simple to learn and understand, yet self-destructive financial behaviors, flying in the face of such basics, are too often the norm. This presentation will identify the source of destructive financial behaviors and what we as professionals can do to help clients make better decisions. *Ted Klontz, Ph.D. (Psychology), based in Nashville, TN, is a researcher, speaker, trainer, workshop designer and facilitator, consultant to and troubleshooter for major athletic and entertainment management groups, as well as the U.S. Defense Department. He is a principal in the Klontz Consulting Group.*

**Career Stage:** All / **Competency:** Relationship Skills, Communication Skills / **CFP Topic List:** General Principles of Financial Planning, Client Trust & Communication / **CFP CE Credit:** 1.5 Submitted

**RESERVATIONS ARE A MUST! Reservations deadline April 17<sup>th</sup>**

To reserve your spot, call 877-281-0675 and choose #1 or make your reservations on our web-site via PayPal. When reserving by phone, make your check out to FPA Ventura, and mail to PO Box 188, Camarillo CA. 93011-0188. The fee is \$45 members and \$65 non-members. *(Sorry, but we have to bill for no-shows or cancellations after April 17<sup>th</sup>.)*

 **GOLF:** Join your peers after the meeting for some fun and frustration. Call Alan Ungar at (818) 222-4773 to let him know if you are playing.