

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 16, 2010

8:00 AM - 12:15 PM

LUNDRING EVENT CENTER @ California Lutheran University
60 West Olsen Road, Thousand Oaks 91360

From the 101, take 23 North to Olsen Road. Go west to university.
The Center is at Olsen and Montclef - next to the swimming pool.

REFLECTIONS ON PLANNING AND INVESTMENT STRATEGY IN THE POST-CRASH WORLD presented by **Kevin Gahagan, CFP®, CIMA®**

The events of 2008 and early 2009 were a crisis for clients and advisors alike. In the aftermath, many advisors have understandably questioned the wisdom of long held beliefs about what works in investing and how we can best serve our clients. According to Kevin Gahagan, such examination is worthwhile but advisors must use caution in drawing conclusions too quickly. The crash and its aftermath offer us an opportunity to revisit the services we provide and the ways in which we bring value to our clients. Kevin will discuss thoughts on managing through the melt down and how we can better manage through the crises we're bound to face in the years ahead. Kevin is principal and senior advisor at Mosaic Financial Partners, Inc. in San Francisco.



ECONOMIC FORECASTING AND THE CURRENT RECESSION by **Dan Hamilton, Ph.D.**



Dan Hamilton, Professor and Director of Economics at California Lutheran University's Center for Economic Research and Forecasting (CERF), has been an economic forecaster and model builder since 1997. He will discuss how economic forecasts are created and then move into a discussion of the current recession, its causes and consequences, and implications for the economic landscape going forward. He previously served as Director of Economics at the University of California, Santa Barbara.

WHAT PLANNERS SHOULD DO WHEN A CLIENT DIES presented by **Kenneth W. Kossoff**

During a client's life, planners often serve as the financial quarterback; after a client dies, planners can have different levels of involvement in the administration of a client's estate. The more planners know about their potential roles in estate administration, the more likely it is that they will be able to maintain a position in the lives of their client's successors. Kenneth will discuss some issues relating to the administration of a decedent's trust and probate estate, and how financial planners may assert themselves and fit into the mix of advisors. Kenneth is a partner at Panitz & Kossoff, LLP., and is certified as a specialist in estate planning, probate & trust law by the State Bar of California Board of Legal Specialization.



RESERVATIONS ARE A MUST! Reservations deadline April 12th

To reserve your spot, call 1-877-281-0675 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 12th.)



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.