

“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.”

FPA Quartely Meeting
Friday, April 21, 2006

7:45 am– 8:30 am Registration



“Structured Sales” by Steven R. Craig, CLU, ChFC, MSFS, Principal at Structured Financial Partners in Woodland Hills. Mr. Craig has been in the financial services industry since 1983 and is past president of several San Fernando Valley professional financial organizations. His numerous articles have appeared in national trade publications and have been syndicated in the mainstream press.

He will discuss the structured sale - a concept that will be of interest to any financial planner with clients who may be seeking tax deferral in selling a capital asset.

The structured sale technique combines the installment sale rules covered by IRC Sec. 453 with structured settlement methodologies to create a way for the seller of property to combine the tax deferral of an installment sale with the safety of payments backed by a high-quality annuity. (1 CFP CE credit applied for.)

“Using Technology to Improve the Financial Planning Process” by David Yeske, CFP®, Principal at Yeske & Company in San Francisco. Mr. Yeske has been a financial planner since 1990, when he founded Yeske & Company, Inc., an SEC-registered investment advisor providing fee-only financial planning services. He is a Past-President of the Financial Planning Association (FPA), having served on the FPA’s national board for five years. Prior to that, he served for three years on the national board of the Institute of Certified Financial Planners (ICFP), a predecessor to FPA. He was a founder of the San Francisco Society of the ICFP and served as both president and chair.



Mr. Yeske will discuss how the right technology mix can simultaneously ensure that financial planning is applied as a continuous process, that clients receive the right amount and the right kind of communication, and that the planner and other advisors are able to collaborate effectively in helping clients to reach their goals. (1 CFP CE credit applied for.)

Featured Lunchtime Presentation 12:15 – 1:15 :



“Southern California - a Manifestation of the Global Economy” by Mr. James Flanigan, Business and Financial Columnist, Los Angeles. Mr. Flanigan has been a business columnist for the New York Times, Los Angeles Times and other publications, and has covered national and international business and economics for 43 years. For 20 years he wrote a column in the business section of the Los Angeles Times. He has also written a book on Southern California’s vibrant business climate and its relation to the global economy. (Scheduled for publication by Stanford University Press in 2007.)

His presentation topic, which is also the subject of his book, is that you can see the present and future of the whole U.S. and even the global economy right here in the vibrant business atmosphere of Los Angeles and its wider Southern California area. What are the practical investment consequences of being the center of the world economy at this time? These issues will be covered in the presentation. (1 CFP CE credit applied for.)

Meeting location:

Los Robles Golf Course, located off the 101 Freeway in Thousand Oaks, At 299 South Moorpark Road

FPA members only meeting fee is \$45.00 Non member price for a meeting \$65.00.2006

Season Pass holders also need to please RSVP