

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."

President's Message *by Scott Hansen, CFP®*

There are many exciting changes in store for your FPA chapter in 2007.

The Board of Directors has been hard at work on many projects this year, and I thought I would update you on our progress to date.

At the beginning of the year, we formed four main committees to help us focus on our core initiatives: Membership, Programs, Media Relations and Pro Bono.

Membership Committee is in charge of recruiting and retaining members for our Chapter. Led by *Marcy Burton* and *Gary Strom* (gstrom@partnervest.com) this committee has done an excellent job promoting the value of membership in this chapter. They have also made an invaluable contribution by leading the redevelopment and introduction of the website. *(President Continued page 2)*

Seaching for Case Studies

by Richard Smith, Program Chairman

After receiving overwhelming positive feed back on the theme of last quarter's meeting we have decided to follow that same format.

We'll start off the next meeting with an interesting case study involving some fairly complex estate planning issues. If the January meeting response to the case study is any harbinger, will also stimulate a lot of interesting discussion.

Our speaker's subjects will be relevant to the case study. In July our theme will be "asset protection" and October's theme will be Investment Theory and Practice.

We are looking for case studies for those meetings and ask for your input. If you have a case which you feel would be of interest to the group and be in sync with the theme, please drop me a note with a brief outline of the case--just send it to richard.smith@lfg.com.

ETHICS Class is going to be available, here in this room, right after our October 19th meeting!



Washington's Best Kept Dirty Secret *by Alan Ungar, CFP®*

On March 4, 2007 Douglas Walker the Comptroller General of the United States was interviewed on 60 minutes by Steve Kroft. FINALLY! Somebody besides Ross Perot is talking about the incredibly serious fiscal problem facing our grandchildren. According to Mr. Walker by the year 2040, unless some fundamental changes are made, the federal government *(Secret Continued page 2)*



Member get a Member Program

by Gary Strom, CFP®, CLU, ChFC Membershi Chairperson

We are asking for your help in growing our chapter membership. We were at about 180 members last I looked and we set an ambitious goal of 20% growth in 2007. How does all this help you? *(Membership Continued page 3)*

Pro Bono Program-Helping Kids

by Jeffrey Hardwood, CFP®

As most of you are aware, our chapter has committed to developing a pro bono program this year. The program is starting to take shape, and our initial project will involve providing financial training to foster children who are about to become, or have recently become, independent.

(Pro Bono Continued page 3)

Classified Ads that relate to the Financial Planning

profession



CAREER OPENING

Critical Capital Management Inc. has an opening for somebody who is skilled in the technical side of our business and wants to grow into a senior planning position. He/She would be working with a CFP with over 29 years experience in a small fee based firm located in Calabasas. The job includes supervision of office operations, computer hardware and software management (with outside contractor), data base management and a myriad of other interesting tasks. Candidate must be a college graduate either with a CFP designation or almost there. This person must be technologically competent including a thorough understanding of Microsoft Office, the internet, and a basic understanding of hardware and software. "Rain Making" is not part of the job but client relations is. Please reply to alan@ccmiplan.com Include with your resume why this job sounds interesting to you.

Looking for a new job?
Have an open position available in your practice?
Seeking an intern?
Want to expand your practice? How about looking for office space in a different area?
Is your company having a social event and offering CE credit?
Business cards ads are also available

Please contact anita.lebby@verizon.net for any additional information

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will only be able to pay the interest on the debt and a few entitlements. This means NO OTHER SPENDING!. At the heart of the problem are the future entitlements that need to be paid especially in health care. Every legislature in Congress knows about this problem. They will not do anything unless they are forced to. Mr. Walker intends to continue to speak out wherever he can. With any luck at all his actions will facilitate reaching a "tipping point" and the American public will insist that the problems be faced and the hard choices made. If you missed the program and would like to see it go to http://www.cb-news.com/stories/2007/03/01/60minutes/main2528226.shtml?source=search_story. If you saw it and feel compelled to do something, write your Congress person and tell your clients about it.

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Programs Committee is responsible for the quality of our quarterly meetings and other member events. **Richard Smith** (richard.smith@lfg.com) and **Alan Ungar** (alan@criticalcapitalmgmt.com) have continued to improve our meetings, most notably with the introduction of an interactive case study. Media Relations, led by **Catherine Robson** (catherine.robson@verizon.net) and **Dan Casey** (dcasey@fwg.com) are charged with the task of raising the profile of the chapter and its members through timely and professional distribution of articles, press releases and announcements.

Pro Bono Committee, led by **Jeff Harwood** (harwoodj@venturaadvisors.com) and **Geoff Syndon** (gsindon@adelphia.net) are in the very first stages of launching our Chapter's Pro Bono program. Look for more announcements in the coming weeks about opportunities to help.

As you can see, we have a lot we want to accomplish. It goes without saying that we can use all the help and support from our members. I encourage you to get involved with our chapter. Even if you are unsure how you want to help, please contact our Chapter Executive, **Anita Lebby** (anita.lebby@verizon.net). Anita will be happy to tell you about the many opportunities available to make our chapter even better!



<http://www.fpaventura.org/>

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Growth builds influence in the marketplace and with regulators and legislators. Growth builds benefits as we gain financial leverage to offer more programs and benefit options. Growth means you have a chance to hand-pick the people who shape your profession. This gives everyone great networking opportunities at our next chapter meeting or at the FPA conferences.

To show you that we mean business we'll pick up the lunch and meeting cost for a guest/potential member the first time they attend with you. Only thing we ask is that you check with *Anita Lebbby* or me before the meeting and that your guest be a financial planning professional who shows some interest in the FPA. Next meeting is July 20 and we still have some free guest slots available.

We'd like to welcome three new members: *Larry Rollins, CFP*, Vice President and Branch Manager of Fidelity Investments in Santa Barbara, *Sharon Martin*, President of Profit Strategies, Inc., of West Lake Village, and *Michael Marangola* of Marangola Financial Group of Calabasas. Please introduce yourself to Larry, Michael and Sharon at the next meeting.

Our chapter is dedicated to facilitating the success of our members through education, business development, networking and advocacy. We have the best quarterly meetings of any chapter so let's bring some guest/potential members to show others how much they can benefit by membership.

(Pro Bono Continued from page 1)

By providing financial education to kids, many of whom have lacked stable adult role models, I hope that we might ease their transition to adulthood. By working with young people, my hope is that we can get them to make sound financial decisions from an early age, and help them to avoid the pressures of financial mismanagement. Remember, the extent to which we impact our community depends on the commitment of our members, and I encourage each of us to get involved.

If you would like to get involved, please call Jeffrey Harwood at 818-224-6063.

Mark you calendars for the two remaining meeting of 2007! July 20th and October 19th.

Your FPA Ventura County Chapter Needs You!

What is your 'passion?'

Giving back to your community and helping people through education?

Have you been to conferences and been inspired, through the speakers or workshops? You want to share and help create that atmisspire with in our Chapter?

Please consider serving on our Board of Directors for 2008.

Remember the more you contribute to an organization the more YOU get out of it !

Please contact Anita Lebbby to find out the wonder oppertunities awaiting you with FPAVC!



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