

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 January 15, 2010**

**8:00 a.m. -11:30 A.M.**

**LUNDRING EVENT CENTER @ California Lutheran College**

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

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

## **A NEW YEAR: A NEW BEGINNING!**

Last year you voted to start and end the meeting earlier, and we listened. Our first meeting of the year will start at 8:00 am and end at 11:30 am. **BREAKFAST WILL BE SERVED** - you are on your own for lunch. We are kicking off the New Year with two excellent speakers, perfectly capable of competing with the winners we had in October. What a program that was - this one will be even better!



### **"INSURING THE INVESTMENT PORTFOLIO" presented by Dr. Somnath Basu.**

For those of you who have not had the pleasure of hearing Dr. Basu, you are in for a treat. He is a professor of Finance at California Lutheran University and the Director of its California Institute of Finance. Given our recent past market experience, Dr. Basu's presentation of how to insure our client's portfolios from risk is particularly timely. Dr. Basu's presentation will examine the proper role of insuring your client's portfolios against losses from change in market conditions. He will talk about the various products available for loss mitigation, which range from simple techniques of diversification to more complex techniques of income smoothing and derivative techniques, such as collars and spreads. Dr. Basu is one of those rare academics who can clearly articulate otherwise incomprehensible theories in a user-friendly manner.



### **"PLANNING FOR THE THIRD AGE OF LIFE" presented by Elizabeth Jetton, CFP**

This session was a hit at this year's national conference at Anaheim. Elizabeth will present new research and thoughts on aging and how this impacts our work as financial planners. She will challenge our planning assumptions, offer new tools, conversations and processes for meeting the needs of clients in every phase of life, especially as they enter the "third age." Elizabeth served as President of FPA in 2004 and was Chair in 2005. She is an adjunct professor at Cal Lutheran and University of Georgia. In addition to being a partner and life planner at RTD Advisors, she has been a teacher of meditation for 35 years. You will find this presentation theoretical, inspiring and practical.

## **RESERVATIONS ARE A MUST! Reservations deadline January 8<sup>th</sup>.**

**To reserve your spot, call 1-877- 281- 0675 and choose #1, or make your reservations on our web-site via Pay Pal.** 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 January 12<sup>th</sup>.**

**GOLF:** Join your peers after the meeting for some fun and frustration. Call Tierra Rejada (805) 531-9300 to make your tee-time.

