

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 July 18, 2008

**8:30 a.m. - 1:30 P.M.**

Los Robles Country Club Thousand Oaks  
Located directly off the 101 Freeway at Moorpark Road  
\$45 for FPA Members \$65 Non-Members (lunch included)



### Case Study: "The Dual Advisor Conundrum" presented by Gary Strom CFP®

How do you handle the client relationship when there is more than one advisor? Client is reluctant to move everything to one planner, but missteps have been made and there is no collaboration because of a somewhat "competitive" relationship. How do you approach the client without appearing to take advantage of the planning mistakes/results? How do you get control of the situation? What micro & macro considerations need to be taken into account? What is best for client?



### The New Rules of Marketing...Blogs, Social Media, Wikis and more presented by Lorrie Thomas

The World Wide Web has changed the way we communicate, work, spend money, time AND most importantly, changed the way financial professionals approach marketing. Lorrie Thomas will address the power new technologies (blogs, social media, and wikis) and present ideas to use the new rules of marketing as it applies to your specific business.

Ms. Thomas is an instructor at UCSB Extension and UC Berkeley Extension where she teaches Web Marketing Applications and Search Engine Marketing Applications classes. Ms. Thomas was on the founding teams at ValueClick Media and CallWave, Inc. She served as an internal Web Marketing Consultant to Affinity Group Inc., an outdoor-recreation company and as Web Marketing Director at ProHealth, Inc. Her industry expertise encompasses developing web marketing strategy, redesigning and optimizing websites, search engine marketing, affiliate marketing, selling and buying online advertising and educating students and businesses on a variety of web marketing-related topics.

### Opportunities for Financial Planners under the Pension Protection Act of 2006

#### Presented by Baylis R. Resnick

The presentation will introduce techniques for maximizing contributions to Defined Benefit, Defined Contribution and 401K plans through creative combinations. Mr. Resnick will also share with us new opportunities for increased roles by financial planners because of court decisions defining stricter fiduciary liability and responsibility requirements.



Baylis has more than 38 years experience in Pension consulting, including: administration, plan design, sales and management. He specializes in creative plan designs, which maximize contributions to the favored group, while controlling contributions to the other eligible employees. In 1990, Baylis joined Polycomp Administrative Services, Inc. He is a frequent speaker at CPA, CFP, and Pension Industry Conferences.

### Transition for Transformation – Moving FPA from a Good to a Great 21<sup>st</sup> Century Association presented by Marv Tuttle



Come learn how the FPA board envisions the next level of development of the association to grow the profession. FPA's focus is centered on knowledge, advocacy, community and leadership. Marv Tuttle is the Executive Director and CEP of the Financial Planning Association. Prior to that he served as publisher and editor of the Journal of Financial Planning served in various leadership roles in FPA's predecessor organization the Institute of Certified Financial Planners and has been a leader in our industry for a long time.

### RESERVATIONS



**To reserve your spot** call 1-877 281 0675 and choose #1—Make your check out to FPA Ventura, and mail to PO Box 188, Camarillo CA. 93011-0188 (\$45 members-\$65 non-members). Reservations must be made by July 10<sup>th</sup>. Sorry but we have to bill for no-shows or cancellations after July 10<sup>th</sup> (we get charged by the facility).



**GOLF:** Join your peers after the meeting for some fun and frustration.  
Call Los Robles at (805) 495 6421 to make your tee-time.