FPA. FINANCIAL PLANNING ASSOCIATION

The Heart of Financial Planning™

Ventura County Chapter
Serving Los Angeles, Santa Barbara, & Ventura Counties
FPA Ventura County
PO Box 188
Camarillo, CA 93011-0188
www.fpaventura.org (877) 281-0675

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 17, 2009

8:30 a.m. -12:30 P.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.

We have another poignant program planned. In addition to the excellent presentations listed below, we will have, a fun Ice breaker and, of course, ample time for valuable networking. NOTE: Due to popular demand, we will end at 12:30 this time.

COMPLIANCE PROOF YOUR PRACTICE, **presented by Tim Welch.** No doubt about it, compliance is a pain, but a necessary evil! Tim Welch is an expert on streamlining the rigorous compliance requisites. He is President and founder of Nexus Strategy LLC, a leading marketing consulting firm to the wealth management industry, and was formerly Director of Business Consulting Services for Schwab Institutional. Prior to his engagement with Schwab, he was responsible for product development and training for financial advisors as a VP at Merrill Lynch. Mr. Welch will introduce the latest innovations in technology that will enable us to meet the growing challenge of meeting compliance requirements. In addition to showcasing actionable solutions, he will highlight best practices among leading advisors.

CREATING AND PRESENTING INVESTMENT POLICY STATEMENTS, presented by Harry Starn, Jr. Harry Starn, Jr. is a professor at California Lutheran University's MBA in Financial Planning Program and an Associate Director of its California Institute of Finance. His topic is relevant to all planners who manage assets. Getting the Investment Policy Statement right is key to client relationships and an important firewall from litigious clients. Professor Starn will present ideas for making your IPSs relevant, succinct, and easy to produce.

ACCESSING THE WORLD ENERGY MARKETS: Craig Kirkpatrick is a Founding Partner of Kensington Funds. Prior to that, he was VP of Capital Markets at the Liquidity Fund. He received his BS in Finance from the University of California at Berkeley .Mr. Kirkpatrick will present an overview of the worldwide demand for energy, water, transportation and communication. There is a liquid market of available securities, and Mr. Kirkpatrick will educate us on how to access that market and how its positioning will facilitate further portfolio diversification.

RESERVATIONS ARE A MUST! Reservations deadline July 10th.

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 July 14th.***

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