

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 October 17, 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)

Thanks to our program underwriter



Meeting Focus: "DEATH AND TAXES"

In life and in our practices we can be sure of two things: DEATH AND TAXES—so we thought it would be appropriate to have a program reflecting those life truisms.

Many of you expressed extreme disappointment about our having to cancel the case study at our last meeting – we assure you—that will not happen this time We will also be presenting a session of Planner Tips and Planner Help.

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?

Helping Families Deal with Imminent Death *presented by Stephen Jamison PH.D.*



In this presentation, Dr. Jamison will focus on how financial planners can assist families who are dealing with a member's incurable or terminal illness or imminent death. After a brief discussion about the nature of the dying process today, he will describe some of the more common issues that families and patients themselves may face in such circumstances including issues related to healthcare and medical options, care giving responsibilities, and end-of-life preferences. Knowing the variety of these possible issues and some techniques to defuse them can help financial planners better advise their clients.

Stephen Jamison, Ph.D. is the California Coordinator for Compassion & Choices, the largest and oldest national right to die organization in the nation. Dr. Jamison is a social psychologist and medical ethicist, as well as the author of numerous articles and books on end of life issues, including *Final Acts of Love* (Tarcher/Putnam Publishing). He serves on the medical ethics committee of Kaiser San Rafael Medical Center, is a member of the California Coalition for Compassionate Care, the San Francisco Bay Area End-of-Life Network, and the Advisory Committee on End of Life Decisions of the American Psychological Association. He received his doctorate from the University of California, Davis, where he later served on the faculty and was responsible for courses in family issues, interaction analysis, social psychology, and death and dying.

2008 Tax Update for Financial Planners *presented by Vicki Mulak*



Part of a financial planning professional's client due diligence requires maintaining a level of tax law competency. Since the dynamics of federal and state tax law exist within an environment of constant change Vicki Mulak, EA, CFP will help us navigate through recent changes, as well as provide some idea of what lies ahead.

Vicki is an Enrolled Agent and a (CFP). As owner of American Financial and Tax, located in Tustin, Vicki has assisted both business owners and individuals for twenty-two years in a variety of tax and financial matters, including tax planning and preparation (individual, business and estate/trust), tax representation in audit and collections, retirement planning, estate planning and investment sales.

Vicki has represented the tax practitioner community for eleven years on the California Employment Development Dept.'s Small Business Employer's Advisory Committee. Vicki regularly speaks on California tax law and other tax related business topics to such groups as California Society of Enrolled Agents and California Society of Tax Consultants. Vicki is also active with Practitioner Publishing Company, serving as an editor for the Accounting Quickfinder book. She received her Bachelor of Science in Business Administration degree from Thomas Edison State College in Camden, New Jersey, and resides with her husband and daughter in Tustin.

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 October 10th. Sorry but we have to bill for no-shows or cancellations after October 10th (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.