

**Friday July 21, 2006**

**8:30am - 1:30pm**

Meeting location: Los Robles Greens Golf Course that is located directly off the 101 Freeway at Moorpark Road in Thousand Oaks

**\$45.00 for FPA Members and \$65.00 for NON Members (includes lunch)**

8:00 – 9:00 Registration, Networking

**Cindy Eisenhower “Long Term Care Insurance: How it Fits Into A Financial Plan”**



Cindy Eisenhower, Regional Director for Long Term Care in the Western Region for Metropolitan Life Insurance Company. Ms. Eisenhower has been with MetLife since 2002 after spending seven years with New York Life, all in the field of long term care. Previously, she had twenty years of experience as a banker in San Francisco. Ms. Eisenhower will discuss how LTC insurance can protect your client’s retirement account, since LTC is the one thing your clients might not have prepared for that can erode their financial plan. She will also talk about the family implications of Long Term Care. (1 CFP CE credit applied for.)

**Phil Atwan “Guiding Clients Through the Different Kinds of 1031 Exchanges**

Phil Atwan, Vice President at Exchange Resources, Inc. of San Diego, a tax-deferred exchange company specializing in 1031 exchanges. Mr. Atwan began his real estate career with Safeco Title Insurance Company in 1982. He has an extensive understanding of the real estate industry, both technically and from a marketing perspective, having served on the Board of Directors for the Escrow Associates of the San Gabriel Valley and the Los Angeles Escrow Association. In addition, he serves as an officer for Foreclosure Resources, Inc., a trustee that specializes in foreclosing on behalf of both institutional and private beneficiaries.



Mr. Atwan will cover the five types of 1031 exchanges: delayed exchange, simultaneous exchange, reverse exchange, build to suit exchange, and the personal property exchange. He will give examples of these 1031 exchanges and show how they work. And he will discuss how your clients can take advantage of them with regard to the IRS rules and regulations. (1 CFP CE credit applied for.)

**David Solie on "The Secret Mission of Baby Boomers"**



Featured After Lunch Presentation. David Solie, MS, PA, Medical Director of the life insurance division of Marsh Private Client Services located in Woodland Hills. Mr. Solie is a licensed Physicians Assistant with an advanced degree in clinical medicine. He entered the life insurance industry in 1983 as a medical specialist representing impaired risk clients. Mr. Solie is the author of “How To Say It to Seniors: Closing the Communication Gap with Our Elders”, released by Prentice Hall Press in September 2004. He has particular expertise in geriatric psychology and its impact on working with older clients. Mr. Solie’s presentation will provide a global perspective on the developmental issues of middle age clients and how these psychological tasks impact suitability testing, product selection, case design, and information packaging for both financial and estate planning. His talk will give planners a new appreciation of the relationship between financial and personal aspects of risk tolerance for middle age adults and their role in suitability determinations. (1 CFP CE credit applied for.)



The first FOUR members who RSVP and want to play golf after our July 21st meeting will be included in a foursome and your tee time will be held until the meeting is over!! Please pay for your golf through the Pro Shop.

**Be sure to include your desire to play golf when you RSVP.**

Register by **July 15th** (checks must be mailed)  
 For information contact (805) 444-1404 or [anita.lebby@verizon.net](mailto:anita.lebby@verizon.net)  
 Reserve your place for FPA Ventura County's **July 21st** Quarterly Meeting

Complete Name: (First) \_\_\_\_\_ (Last) \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_ E-mail address: \_\_\_\_\_  
 Current FPA Member # \_\_\_\_\_ Would you like information on FPA membership? \_\_\_\_\_

**Please make a check payable to FPA Ventura County in the amount of \$45.00 or \$65.00  
 Mail to Anita Lebby, FPA Chapter Executive, 221 Ravencrest Ct, Newbury Park, 91320**

Check # \_\_\_\_\_

YES, I would like to be one of the first four to RSVP GOLF