

*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 20, 2012**

**8:00 AM - 12:15 PM**

**LUNDRING EVENT CENTER @ California Lutheran University**

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

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

**SOCIAL MEDIA FOR FINANCIAL PLANNERS** presented by **Brent Carnduff, CFP®**

With the release of Regulatory Notice 10-06 in January of 2010 and the clarification offered by Regulatory Notice 11-39 this past August, FINRA has made it clear that there is room and opportunity for the Financial Services Industry to join the world of Social Media. Compliance requirements, although cumbersome, are now manageable and potential clients are using social media to find the professionals that offer the services that they are interested in. Brent Carnduff will discuss the benefits of social media, strategies for meeting compliance requirements, and introduce the process of networking and marketing through available social media channels. Brent is the founder and owner of Echelon Business Solutions. EBS is a boutique Internet Marketing firm that specializes in working with the Financial Services Industry.



**FEDERAL AND STATE TAX UPDATE** presented by **Janet Davis, CFP®, CPA**



Again this year, politicians are delaying decisions on tax legislation. But even if Congress passes no new tax laws before or after the presidential election, there are tremendous planning opportunities available in 2012. We will review the major federal tax law for 2011 and 2012, including AMT, tax credits, and small business deductions. We will discuss planning opportunities that exist in 2012 as income tax rates are set to rise and many tax benefits are scheduled to sunset in 2013. Janet is a CFP® practitioner and CPA whose income tax practice focuses on partnering with financial advisors to jointly give clients superior tax advice. She is also a part-time adjunct instructor in financial planning and taxation.

**RESERVATIONS ARE A MUST! Reservations deadline January 16<sup>th</sup>**

To reserve your spot, call 1-877-281-0675 and choose #1 or make your reservations on our website via PayPal. 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 16<sup>th</sup>.)



**GOLF:** Join your peers after the meeting for some fun and frustration. Call Alan Ungar at (818) 222-4773 to let him know if you are playing.