

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 16th, 2010

8:00 AM - 12:15 PM

Montecito Country Club in Santa Barbara

920 Summit Road, Santa Barbara, CA 93108

*From Thousand Oaks: 101 to Hermosillo Drive to Hot Springs Road,
then turn left on Summit Road*

From San Luis Obispo: 101 to Hot Springs Road, turn left on Summit Road

LIFE INSURANCE AS AN ASSET CLASS presented by **Richard M. Weber, MBA, CLU, AEP®**

In this fascinating hour presentation Dick Weber highlights the possibility of creating a portfolio of life insurance policies that optimize the client's lifetime life insurance needs. The presentation explores how life insurance policies should be funded and managed with consideration of modern portfolio theory and integrated into investment portfolios. Mr. Weber is an accomplished national presenter, writer and author. He was awarded the Kenneth Black, Jr. Leadership award by the Society of Financial Service Professionals in 2008, the Distinguished Accredited Estate Planner award by the National Association of Estate Planners and Councils in 2009 and elected to their Estate Planning Hall of Fame.



PASS THE KLEENEX: TECHNIQUES FOR WORKING WITH CLIENTS IN TRANSITION

by **Elizabeth Palomeque, CFP®, CDFA, CGRS**



We all know that major financial transitions come with major emotional baggage. Death, divorce, disability and retirement are just a few of the financial events that bring tears into our offices. Facing these emotions can be challenging for us as planners; for many of us, it's our least favorite part of the job. But there's an unparalleled opportunity here: if handled correctly, these experiences can create a real and lasting client/planner bond. Whether you are empathetically challenged or naturally empathetic, this session will provide you with concrete tools for working with clients in transition...without becoming overwhelmed yourself.

RESERVATIONS ARE A MUST! Reservations deadline July 12th, 2010

To reserve your spot, call 1-877-281-0675 and choose #1 or make your reservations on our web-site 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 July 12th.)



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.