FPA FINANCIAL PLANNING ASSOCIATION
The Heart of Financial Planning™

Ventura County Chapter
Serving Los Angeles, Ventura
& Santa Barbara 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 October 15, 2010

8:00 AM – 8:30 Breakfast; 8:30 – 12:15 PM Presentations

LUNDRING EVENT CENTER @ California Lutheran University

60 West Olsen Road, Thousand Oaks 91360

from the 101 take Lynn Road north, Lynn Road becomes Olsen Road
from the 23 go west on Olsen Road
Lundring Event Center is at corner of Olsen and Montclef – adjacent to the swimming pool.

FIDUCIARY GUIDELINES FOR LIFE INSURANCE PLANNING

by **Joseph W. Maczuga, LIC, CFIS.** Applying fiduciary standards to the risk management component of financial planning has been the missing link to achieving a full fiduciary practice. Life insurance is one of the primary solutions to many of the risks uncovered during the client interview and fact gathering phase. Joseph will help to define the core issues, eliminate erroneous perceptions, challenge 'established' cultural influence and explain how to incorporate Prudent Principles with a Fiduciary Process. Mr. Maczuga is President of Comprehensive Analytics and serves as Executive Director of the Fee Advisors Network.

FPA PRESENTATION – SOCIAL SECURITY *by* Alan B. Ungar, CFP®

Alan, as chair of FPA's Social Security Task Force, will be introducing a new tool that all FPA members can use to educate the public about the impending Social Security shortfall. The presentation will enable planners to offer a public service while at the same time creating some positive public relations.

INSIDE OUT FINANCIAL PLANNING *by* Peggy A. Mengel

Do you really know how your clients will react to future "setbacks" in their financial plan? How have you fine-tuned your process with clients to get to know them at a deeper, behavioral level? In this interactive workshop Peggy will demonstrate how to quickly get to the core of a client's life in order to communicate with them "on their term." Peggy is a licensed DNA Behavior Consultant who has trained over 10,000 financial advisors to help them achieve top marketing, sales, and management performance. As a licensed DNA Behavior Consultant, she has combined experience gained from her 25- year financial services career to give you practical, "real world" techniques to help you transform your client relationships.

RESERVATIONS ARE A MUST! **Reservations deadline October 12th**

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 October 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.