

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 21, 2011

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.

AN UPDATE ON THE ECONOMY AND THE ART OF ECONOMIC FORECASTING
by **Dan Hamilton, Ph.D.**

Dan Hamilton, Professor and Director of Economics at California Lutheran University's Center for Economic Research and Forecasting (CERF), has been an economic forecaster and model builder since 1997. In this presentation he will discuss how economic forecasts are created, and then move into a discussion about the current economic landscape. The session will help you understand factors driving the recent economic weakness and provide updated economic projections concerning business activity on both the regional and state level. Attendees will leave the session with informed insight useful for planning, budgeting and conducting business in a fiscally prudent manner. Prior to his position with CERF, Dan served as Director of Economics at the University of California, Santa Barbara.



A CHARITABLE GIFTING PRIMER: DO'S, DON'TS, TRICKS AND TIPS

by **Juan C. Ros, CFP®**



Juan Ros is the Director of Development for The Ronald Reagan Presidential Foundation in Simi Valley, California, where he is responsible for raising major and planned gifts in support of the Ronald Reagan Presidential Library and Museum and the various programs of the Reagan Foundation. In this session he will provide attendees with a refresher on the basics of charitable giving: rules, deduction limits, and the various giving vehicles. In addition, attendees will learn how recent changes in the law and the current low-interest-rate environment may impact the charitable choices their clients make. Finally, practical strategies to minimize taxes

using charitable giving will be presented, including some novel approaches that attendees can incorporate into their practices today. Prior to this position Juan served as Vice President of Philanthropy with the National Office of The ALS Association.

RESERVATIONS ARE A MUST! Reservations deadline October 18th

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 October 18th.)



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.