FPA

FINANCIAL PLANNING ASSOCIATION

The Heart of Financial Planning™

Ventura County Chapter
Serving Los Angeles, Santa Barbara, & Ventura 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 16, 2009

8:30 a.m. -12:30 P.M.

LUNDRING EVENT CENTER @ California Lutheran College

60 West Olsen Road, Thousand Oaks 91360

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

This quarter's program is eclectic. There will be estate planning education, behavioral finance educating and practice management guidance. In addition to a great list of speakers, we will be electing 2010 officers. Nominations will be accepted from the floor and the nominating committee will present a slate. There also will be a surprise planning exercise (not a case study), planner tips and planner help. Once again the meeting will end at 12:30. **DON'T MISS THIS ONE --there will be a surprise!**

AN ADVISOR'S GUIDE TO BEHAVORIAL FINANCE presented by Joseph M. Hart Some of us heard Joe at another convention and in addition to a very useful and interesting presentation there was a wonderful inspiring surprise. Joe is the Senior Vice President for Retail Sales for ING Funds Distributors LLC. "Modern portfolio theory assumes that investors approach risk and return in rational terms. But every advisor knows that behind the rational tools of our trade—lurks the often irrational world of investor emotions and motivations." Mr. Hart will help us understand and exploit this dynamic.

POSITIONING YOUR PRACTICE FOR SUCCESS presented by Richard Rojeck CFP, MBA Sometime ago Rich spoke to us and his presentation was so well received we decided to ask him back. However this presentation will be different. Rich will be presenting some very useful pragmatic ideas to help us build our practices. While much of the presentation will be about developing a business plan (including marketing plan), something so many of us resist, he'll also be giving us templates and tips which will enable tackling this sometimes overwhelming task in a relatively non-invasive or traumatic way.

TRUST ADMINISTRATION AND FUNDING ISSUES: Coordination Among Attorneys, CPA's and Financial Planners presented by Scott Samsky, Esq.
Mr. Samsky is a Lawyer and CPA whose major area of expertise is estate planning. Scott will discuss the titling and designation of beneficiary designations when the estate plan is created, when the death of a non-married client occurs, and after the death of the first spouse. He will also cover how to best coordinate with all relevant professionals what is expected in each area of expertise. This is an important topic that will help us avoid mistakes, be more efficient, and in general add to our professionalism.

RESERVATIONS ARE A MUST! Reservations deadline October 9 th.

To reserve your spot, **call 1-877- 281- 0675 and choose #1, or make your reservations on our web-site via Pay Pal.** 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 13th.***

GOLF: Join your peers after the meeting for some fun and frustration. Call Tierra Rejada (805) 531-9300 to make your tee-time.