

ALLIED PROFESSIONALS SUMMIT 2010

Hosted by the Financial Planning Association of Orange County

Tuesday, October 19th 10:30am – 2:30pm

Irvine Marriott

18000 Von Karman Avenue

Irvine, CA 92612

www.alliedprofessionalssummit.com

The 3rd annual **Allied Professionals Summit** creates a dynamic workshop environment designed to facilitate networking among wealth management professionals of all disciplines, develop the structure and skills necessary to collaborate in a team approach to serve clients, and learn about practical advanced planning techniques.

Keynote Speaker:

Patricia Soldano, Southern California President of GenSpring Family Offices - **“Thoughts on Collaboration from the Family Office Perspective: Best Practices for Your Practice”**

Case Study Presentation:

“Strictly Business – Advanced Strategies for Family Business Exit Planning”

Panel includes:

Craig Alexander, Esq., Self & Bhamre, **Cheryl Schaffer, CPA, MST**, Wright Ford Young & Co., **Rick Keller, CFP®**, First Foundation Advisors

What Professionals Will Be in Attendance?

CPAs, CFPs, Estate Planning Attorneys, Wealth Managers, Investment Advisors, Private Bankers, Trust Officers, Life and Disability Insurance Professionals, Charitable Tax Planners, Mortgage Planners, and Planned Giving Specialists

Summit includes 3-course lunch and self-parking. For more information, please go to www.alliedprofessionalssummit.com

Name _____
Company _____
Address _____
City, State, Zip _____
Email _____
Phone _____

of attendees _____ x \$45: \$ _____ (on or before Sept. 30, 2010)

of attendees _____ x \$55: \$ _____ (after Sept. 30, 2010)

* Fees non-refundable after Sept.30, 2010

** FPA membership not required

ATTENDEE BENEFITS

- Best practices for collaborating with allied professionals in a team-based approach
- Practical advanced planning techniques from leaders in the local wealth, estate and tax planning professions
- 1.5 to 2 hours of pending CE credit for CFP®, CPA, and MCLE (please see website for details)
- Network with like-minded wealth professionals
- Interactive, case study format
- Serve your clients more effectively and grow your business
- Broaden your perspective on effective team building
- Update on estate tax legislation

Methods to Pay

Go to www.alliedprofessionalssummit.com and click ‘Register’ page to enter your information and pay online by credit card.

OR

Complete registration form, attach a check made payable to FPA Orange County and mail to:

**Allied Professionals Summit
2549 Eastbluff Drive #220
Newport Beach, CA 92660**