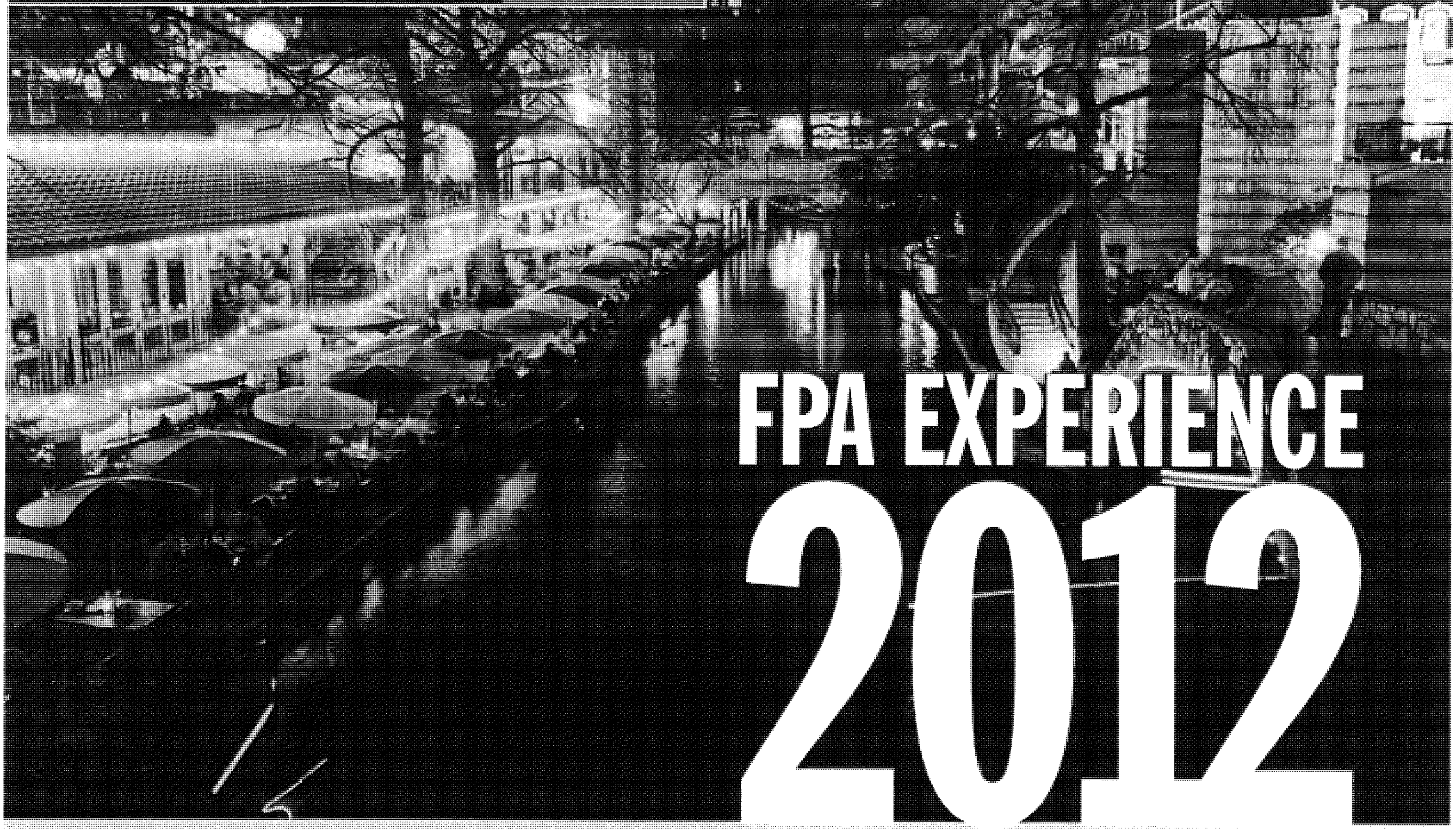
FPA

CONFERENCE SERIES
EXPERIENCE
2012

X



Discover it all at FPA Experience 2012

LEARN

GROW

CONNECT

IMAGINE

LEAD

EXPLORE

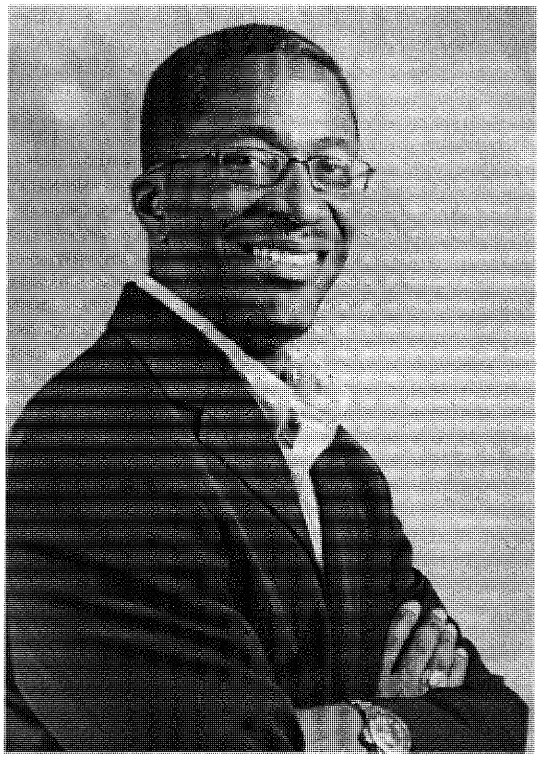
What will your experience be?

JOIN YOUR COLLEAGUES IN SAN ANTONIO
SEPT 29 – OCT 2, 2012
HENRY B. GONZALEZ CONVENTION CENTER

Register Today:
FPAAnnualConference.org

WHY ATTEND?

THE PREMIER
FINANCIAL PLANNING EVENT
OF THE YEAR



An Immeasurable ROI

My father was a minister who served a church in Jacksonville, Florida, and also one in a small town in south Georgia called Folkston. Its claim to fame was being the Gateway to the Okefenokee Swamp. Dad's philosophy, drummed into me as a child, was that you don't get to come to church and just sit in the pew—you have to give something in order to get something.

When I was asked to chair the Task Force for FPA Experience 2012, the good news was that I had 15 months ahead of me. Another bit of good news was that I knew there were people I could lean on to help me, others who weren't content to just sit in the pew. A mix of new-to-Experience fresh thinkers and veterans who have served on the Task Force in the past or have been chapter presidents, our group of 11 used one primary filter in considering content for Experience 2012: Any individual session should be strong enough to meet the test *"Even without CE, does the attendee walk away with great ROI from what is a sizeable investment?"*

That is both the request and the challenge I put in front of you as you consider making your investment in Experience 2012—to consider the value of your total experience, the value of the individual connections that create your professional community, the value of an hour (even without CE) with Natalie Choate, Neel Kashkari, or Julie Littlechild. Or an hour on a topic such as healthcare reform and its effects on your clients, growing a multigenerational clientele, connecting the heart and the mind through charitable planning, planning for the modern family, or where to put risk capital today. In fact, I suggest to you that your *real* challenge will be choosing among so many outstanding sessions.

If you happened to read my initial post in the Experience 2012 Connections community, you can probably tell that I love a good quote. I'm going to offer you another one, which I believe reflects the spirit of how you should think about the ROI from Experience 2012. Ben Franklin said that *"An investment in knowledge pays the best interest."* There are not eight other words that carry such weight about what *investing in yourself* can mean. Remember—you can't just sit in the pew. In this case, give yourself the opportunity to get immeasurable ROI.

I look forward to seeing you in San Antonio.

Lee Baker, CFP®
President, Apex Financial Services

REGISTER TODAY!

ABOUT FPA EXPERIENCE 2012

FPA Experience 2012, the annual conference of the financial planning community, will offer you unparalleled networking opportunities, high-quality diverse education and an exhibit hall filled with the latest product and service providers. The program is filled with ground-breaking content covering all practice disciplines including:

- Core Disciplines
- Longevity and Retirement Planning
- Portfolio Optimization
- Practice Optimization
- Specialized Client Engagement

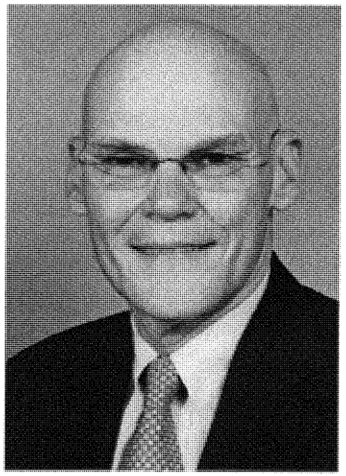
The FPA Experience Conference attracts a global audience and you will have a one-of-a-kind experience, both in the educational sessions and in the exhibit hall. While many principles and partners of financial planning firms are in attendance, it also attracts financial professionals in associated industries and an international audience representing approximately 28 countries.

KEYNOTE SPEAKERS

JAMES CARVILLE AND MARY MATALIN

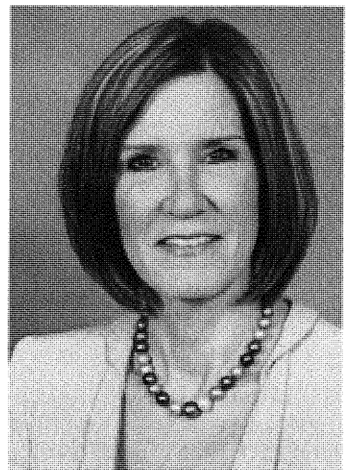
All's Fair: Love, War and Politics

Saturday, September 29, 3:30 p.m.–5:00 p.m.



James Carville

James "The Ragin' Cajun" Carville is America's best-known political consultant. His long list of electoral successes includes leading Ehud Barak to victory to become Prime Minister of Israel in 1999 and most notably helping to secure William Jefferson Clinton as President of the United States in 1992. In addition to his exceptional political career, Carville is also a best-selling author, actor, producer, talk-show host, speaker and restaurateur. He currently continues his role in politics as a paid consultant globally. He also serves as a Professor of Practice at Tulane University in New Orleans, where he lives with his wife, Mary Matalin, and their two daughters.



Mary Matalin

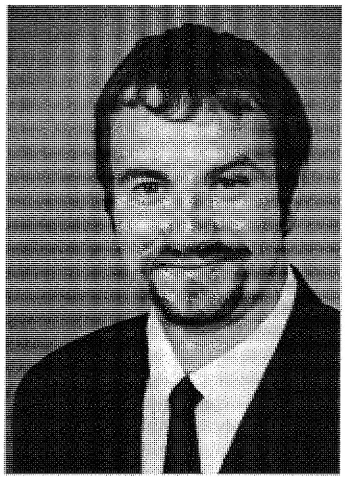
Mary Matalin is a prominent political figure who has made frequent television and radio appearances and is a *New York Times* bestselling author. Her political successes include serving under President Ronald Reagan, George H. W. Bush, and George W. Bush. She was also the first White House official to hold the double title of assistant and counselor to the Vice President. Following her political career, Matalin became a well-respected political commentator with appearances on Meet the Press. In addition she hosted *Crossfire* and her own talk show, *The Mary Matalin Show*, which received the honor of being recognized as one of the "100 Most Important Talk Shows in America" according to *Talkers* magazine. Currently, she co-hosts the nationally-syndicated radio program *Both Sides Now*, is a sought after public speaker, and sits on the boards of numerous respected institutions, including Tulane University's President's Council. She lives in New Orleans with her husband, James Carville, and their two daughters.

THE PARTISAN POLITICAL COUPLE

SAL GIUNTA

Uncommon Valor: The Importance of Teamwork, Sacrifice and Leadership

Sunday, September 30, 3:30 p.m.–4:45 p.m.



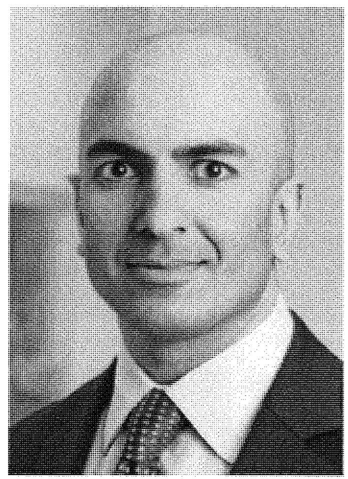
Army Staff Sgt. Salvatore (Sal) Giunta is the first living service member awarded the Medal of Honor since Vietnam. A valiant leader, who was introduced by President Barack Obama as being "as humble as he is courageous" when he was presented with the military's highest decoration, Giunta earned the Medal of Honor for his heroic actions during combat in the Korengal Valley of Afghanistan. A true American hero, Giunta shares with audiences the importance of teamwork, sacrifice and leadership in the face of overwhelming circumstances.

THE WAR HERO

NEEL KASHKARI

Client Portfolio Implications from Global Policy and Markets

Monday, October 1, 3:15 p.m.–4:30 p.m.



Neel Kashkari, financial services industry expert, delivers the closing keynote address of FPA Experience 2012, providing a grounding view of the global economy and sharing practical, up-close, and by-the-minute perspectives on how advisers serve their clients now and in the future.

A highly regarded and knowledgeable speaker in financial services, Kashkari is the managing director and head of global equities at PIMCO's Newport Beach, Calif. office, and president of PIMCO Equity Series Trust. Earlier he served as senior adviser to then-U.S. Secretary of the Treasury Henry Paulson and later as Assistant Secretary of the Treasury, overseeing the Troubled Assets Relief Program (TARP).

A GLOBAL FINANCIAL EXPERT

FPA FINANCIAL PLANNING ASSOCIATION

FPA EXPERIENCE 2012 OFFERS THE FOLLOWING SUPER SESSIONS...

YOU WON'T WANT TO MISS THIS!

LATINA AND FINANCIAL EDUCATION
—Anna Cabral, Former U.S. Treasurer

Check website for details

1:45–3:00 PM | SUNDAY, SEPTEMBER 30

PLANNING FOR RETIREMENT BENEFITS: RECENT DEVELOPMENTS AND CURRENT TRENDS
—Natalie Choate, Esq.

Learn what the U.S. Congress, the courts, and the IRS have done with our retirement benefits lately. Issues include longevity annuities in IRAs, new guidance on IRA estate tax issues, the Paschal case (must Form 5329 be filed every year?), the key prohibited transaction announcement, the year of the flip flop (new rulings go both ways on NUA), late rollovers, grantor trusts, estate tax exemption portability, and the latest Washington proposals for IRA changes.

1:45–2:45PM | MONDAY, OCTOBER 1

MONEY IS NO OBJECT: ACCOUNTING FOR DEFICITS, TAXES, AND TRUST IN THE 21ST CENTURY
—Stephanie Kelton, Ph.D.

As the Fed expands its balance sheet in response to the Great Recession, what does it mean for the future of inflation, interest rates, and our country's ability to borrow? Do taxes need to rise? What if foreigners decide they don't want to hold our bonds? Can we be forced to adopt harsh measures of austerity? These questions are on the minds of many Americans, and the answers require a more fundamental understanding of macroeconomics than textbooks provide. Join professor Stephanie Kelton as she explores the mechanics of modern money, government deficits and issues of insolvency, and the very nature of money itself.

1:45–2:45PM | MONDAY, OCTOBER 1

FANNIE MAE AND FREDDIE MAC: TURNING THE AMERICAN DREAM INTO A NIGHTMARE
—Oonagh McDonald, Ph.D., CBE

Take a look at the state of the American mortgage market. In just 13 years, it was destroyed in the misconception that homeownership is always good, an ideology that blinded everyone to the perils of politically driven lending. Regulators did little to curb such lending and executives lined their pockets. Fannie Mae and Freddie Mac dominated the market, exporting their debt and subprime mortgages to the rest of the world. Fannie and Freddie are in conservatorship and could be resurrected. The federal government, through Fannie and Freddie, backs almost half of the $11 trillion outstanding mortgages in the United States, and with the FHA, guarantees about 84 percent of all mortgages.

1:45–2:45PM | MONDAY, OCTOBER 1

FPA EXPERIENCE 2012 SCHEDULE AT-A-GLANCE

FRIDAY, SEPTEMBER 28

8:00 a.m. – 5:30 p.m.	**PRE-CONFERENCE WORKSHOP: The Seven Stages of Money Maturity® Workshop: A Model for Understanding and Developing Client Relationships (Day 1)*** *George D. Kinder, CFP® RLP®*
	PRE-CONFERENCE WORKSHOP: GrowBIG® Workshop: Accelerating and Strengthening Client Acquisition and Retention (Day 1)* *Mo Bunnell, Managing Partner of Bunnell Idea Group and Debra Partridge, Certified GrowBIG® Facilitator and Coach*

SATURDAY, SEPTEMBER 29 — SESSIONS BEGIN TODAY!

8:00 a.m. – 12:00 p.m.	**PRE-CONFERENCE WORKSHOP: Making the Modern Estate Plan Work*** *Leslie R. Daff, J.D. and Randy Gardner, CFP®, JD, LLM, CPA*
	PRE-CONFERENCE WORKSHOP: The Healthcare Conversations and Family Support Network: Integrating Health, Caregiving, and Special Needs Challenges and Solutions into a Holistic Planning and Implementation Process ***Presented by:** Lewis J. Walker, CFP®, CRC® and Maria C. Forbes, Kolbe Certified™, AECS®*
8:00 a.m. – 3:00 p.m.	**PRE-CONFERENCE WORKSHOP: What Color is Your Parachute? For Financial Planners: Designing Your Next Stage of Life*** *John E. Nelson*
	PRE-CONFERENCE WORKSHOP: The Seven Stages of Money Maturity® Workshop: A Model for Understanding and Developing Client Relationships (Day 2)* *George D. Kinder, CFP® RLP®*
	PRE-CONFERENCE WORKSHOP: GrowBIG® Workshop: Accelerating and Strengthening Client Acquisition and Retention (Day 2)* *Mo Bunnell, Managing Partner of Bunnell Idea Group and Debra Partridge, Certified GrowBIG® Facilitator and Coach*
9:00 a.m. – 11:50 a.m.	**Financial Planning Challenge: Oral Presentation of Written Case Studies**
12:30 p.m. – 3:10 p.m.	**Financial Planning Challenge: Oral Presentation of Written Case Studies continue**
1:00 p.m. – 2:00 p.m.	**Old Media + Social Media: Successful Advisers' Formula for Business Growth** *Claudio O. Pannunzio*
	Guide to the Markets *Andres Garcia-Amaya*
	The Right Fit: Finding the Clients for Whom You Can Do Your Best Work *Tom Reimer*
1:00 p.m. – 3:15 p.m.	**Ethics in Action** *Daniel J. Candura, CFP®*
2:15 p.m. – 3:15 p.m.	**Applying Super S-Cycles** *Frank E. Holmes*
	Writing Emails and Letters that People will Read *Susan B. Weiner, CFA, Ph.D.*
	The Economic Recovery *John V. Duca, Ph.D., V.P. and Sr. Economist, Federal Reserve Bank of Dallas*
3:30 p.m. – 5:00 p.m.	**OPENING GENERAL SESSION—All's Fair: Love, War and Politics** *James Carville and Mary Matalin*
5:00 p.m. – 7:00 p.m.	**EXHIBIT HALL OPENING RECEPTION AND PROFESSIONAL DEVELOPMENT PAVILION SESSIONS**

*Requires additional fee.

FPA FINANCIAL PLANNING ASSOCIATION

FPA EXPERIENCE 2012 SCHEDULE AT-A-GLANCE

SUNDAY, SEPTEMBER 30

7:30 a.m. – 8:30 a.m.	**SPONSORED BREAKFAST EDUCATIONAL SESSION:** **Live Financially Sound, Fiscally Strong—*Sponsored by:*** *First Command Financial Services* *Wendy Boglioli*
	SPONSORED BREAKFAST EDUCATIONAL SESSION: The Connected Adviser: Staying Compliant in a Mobile World—*Sponsored by:* *Laserfiche* *Timothy Welsh, CFP®*
8:45 a.m. – 9:45 a.m.	**What Advisers Really Need to Know About Executive & Employee Compensation** *Bruce S. Brumberg, Esq.*
	Implementing the Wealth Management Index in Retirement Planning *Ross Levin, CFP®*
	Using Technical Analysis to Guide Portfolio Management Decisions *Art Huprich, CMT*
	Insurability Rules: Secrets Behind the Premiums for Life, Disability and Long Term Care Insurance *Carolyn McClanahan, CFP®, M.D.*
	Cracking the Code: Tactics that Drive Engagement and Growth *Julie Littlechild*
	A Clear Framework for Setting Realistic Client Expectations for Stock and Bond Returns *Christopher J. Brightman, CFA*
	Financial Services and the Middle Class *Neal J. Solomon, CFP®, CLU, ChFC, CASL*
8:45 a.m. – 9:55 a.m.	**Global Update: 2013 Ban on Commissions**
10:00 a.m. – 11:00 a.m.	**SPONSORED EDUCATIONAL SUPER SESSION—*Presented by:*** *Ameriprise Financial Services, Inc.* *Bill J. Williams*
11:15 a.m. – 12:15 p.m.	**How Health-Care Reform Affects You and Your Clients** *Carolyn McClanahan, CFP®, M.D.*
	Tax Strategies for Unmarried Couples *Joshua T. Hatfield Charles, CFP®, ChFC, CLU, CEP*
	Withdrawal Strategies *Jonathan T. Guyton, CFP®*
	Evidence-Based Financial Planning: To Learn... Like a CFP® *Elissa Buie, CFP®, Dave Yeske, CFP®*
	Financial Transitions Planning: Transitions Drive Your Business *Susan K. Bradley, CFP®*
	Transformative Technology you Can Implement Today *William D. Winterberg, CFP®*
	The Case for Global Infrastructure Investing *Frank X. Greywitt, III*
12:15 p.m. – 1:45 p.m.	**LUNCH IN THE EXHIBIT HALL AND PROFESSIONAL DEVELOPMENT PAVILION SESSIONS**
1:15 p.m. – 3:15 p.m.	**Financial Planning Challenge: How Do You Know Challenge**

1:45 p.m. – 3:00 p.m.	**Insurance (pre 65 planning/post 65)** *Katy Votava, Ph.D.*
	Social Security Strategies: The Basics of How to Create and Evaluate Claiming Strategies *William Meyer, William Reichenstein, CFA*
	Washington Update: Why Are Advisers in the Crosshairs? *Duane R. Thompson, AIFA*
	Money Sanity Solutions: Growing Your Multigenerational Market *Nathan Dungan*
	SUPER SESSION: LATINA AND FINANCIAL EDUCATION *Anna Cabral*
3:30 p.m. – 4:45 p.m.	**GENERAL SESSION—Uncommon Valor: The Importance of Teamwork, Sacrifice & Leadership** *Sal Giunta*
4:45 p.m. – 6:30 p.m.	**EXHIBIT HALL CLOSING RECEPTION AND PROFESSIONAL DEVELOPMENT PAVILION SESSIONS**

MONDAY, OCTOBER 1

7:00 a.m. – 7:30 a.m.	**MORNING EYE OPENER**
7:30 a.m. – 8:30 a.m.	**Things You Ought To Know About Life Insurance, But Don't** *Timothy E. Radden, CLU, AEP, ChFC*
	Connecting Talent, Experience, Advisory Capacity, and Profit: Creating Your Firm's Multi-Year Financial Planning Residency *Christine Damico, Jonathan T. Guyton, CFP®*
	Investing in Master Limited Partnerships: the Merits, the Means, and the Risks *Kenny Feng, CFA*
	Social Media from the Trenches: Real Advisers Share Real Success Stories ***Moderator:*** *Michael E. Kitces, MSFS, CFP®, CLU, ChFC* ***Panel:*** *Brittney A. Castro, CRPC, AAMS, CFP®; Cathy Curtis, CFP®; Jeff Rose, CFP®, CRPC, AAMS*
	Multi-Generational Estate Planning with Closely held Business Interests *Peter S. Myers, Esq.*
	Serving Those Who Serve—An Insider's Perspective on Financial Planning for the Military *June A. Walbert, CFP®*
	Federal Tax Update *John M. Kilroy, CPA, CFP®*
8:30 a.m. – 9:45 a.m.	**SPONSORED EXHIBIT HALL BREAKFAST AND PROFESSIONAL DEVELOPMENT PAVILION SESSIONS**

MONDAY, OCTOBER 1 (cont.)

10:00 a.m. – 11:00 a.m.	**The Clients You Don't Know You Have** *Mary Anne Ehlert, CFP®*
	Charitable Giving: Connecting the Heart and Mind *Eddie C. Brown, CFA, CIC*
	Stress, Personality and Risk Tolerance *Mary M. Bell, CFP®, AFC, Cliff A. Robb, Ph.D.*
	How to Use the Written Word to Speak Volumes *Steve F. Sanduski, MBA, CFP®*
	Changing the Conversation: Finding Better Ways to Engage Women *Elizabeth W. Jetton CFP®*
	Understanding the New Medicare Taxes *Michael E. Kitces, MSFS, CFP®, CLU,ChFC*
10:00 a.m. – 12:15 p.m.	**Ethics in Action (Encore Presentation)** *Daniel J. Candura, CFP®*
11:15 a.m. – 12:15 p.m.	**Adviser Best Practices with Corporate Retirement Plans** ***Moderator:*** *Steve Athanassie, CFP®, AIFA* ***Panel:*** *Michael J. DiCenso, PRP, LLIF, AIF, Tom Gonnella, Kathleen Stewart, J.D.*
	Secular Evolution in Relation to Emerging Markets *Michael L. Avery*
	Financial Issues of Aging—a Practical Guide to Advising Clients *Karen P. Schaeffer, CFP®*
	Building a Higher Growth Practice *Jennifer Goldman, CFP®*
	Managed Futures: An Investment to Consider *Richard E. Bornhoft*
	Buying Into A Firm ***Moderator:*** *Marc C. Shaffer, CFP®, AIF®, EA* ***Panel:*** *Eric H. Kies, MBA, CFP®, Tim J. Maurer, CFP®: J.J. Sessions*
12:15 p.m. – 1:45 p.m.	**LUNCH IN THE EXHIBIT HALL AND PROFESSIONAL DEVELOPMENT PAVILION SESSIONS**
1:45 p.m. – 2:45 p.m.	**SUPER SESSION—Fannie Mae and Freddie Mac: Turning the American Dream into a Nightmare** *Oonagh McDonald, CBE, Ph.D.*
	SUPER SESSION—Money Is No Object: Accounting for Deficits, Taxes and Trust in the 21st Century *Stephanie Kelton, Ph.D.*
	SUPER SESSION—Planning for Retirement Benefits: Recent Developments and Current Trends *Natalie B. Choate, Esq.*
3:15 p.m. – 4:30 p.m.	**GENERAL SESSION—Client Portfolio Implications from Global Policy and Markets** *Neel Kashkari*

4:45 p.m. – 5:45 p.m.	**How Do You Think About Where to Put Capital at Risk Today?** *Garnett L. Keith, Jr., ChFC, CLU*
	Building a Generation X and Generation Y Client Base *Theodore M. Jenkin, CFP®, AAMS, AWMA, CRP and Kile Lewis, CRPC®*
	Commodity Investment: Why and How *Robert J. Greer*
	Planning for the Modern Family *Jeffrey Hollander, J.D., Lori L. Epstein, J.D.*
	Ending Your Life Balance Quest: Rhythyms & Routines Can Improve the Flow of your Life *Erin Elizabeth Wells, CPO*
	Adding Property and Casualty Discussions to your Risk Management Review *Christopher Borzych, CFP®, ChFC*
4:45 p.m. – 6:00 p.m.	**Social Security Advanced Strategies:** **How to Optimize Retirement Benefits with Smart Claiming Strategies** *William Meyer, William Reichenstein, CFA*
	Currencies: Diversification and Downside Protection *Axel Merk*
6:30 p.m. – 11:00 p.m.	**FPA Experience Closing Night Party: A benefit to support the Foundation for Financial Planning and the FPA Education and Research Endowment Fund** **Ticket price:** $50 *(The event details will be posted on the FPA website once available)*

TUESDAY, OCTOBER 2

7:30 a.m. – 9:00 a.m.	**SPONSORED BREAKFAST EDUCATIONAL SESSION**
9:15 a.m. – 10:30 a.m.	**Estate Planning in an Uncertain Environment: 2012 Update on Recent and Forthcoming Changes** *Thomas P. Langdon, CFP®, J.D., CFA, LLM*
	The State of the Municipal Bond Market *John V. Miller, CFA*
	Collaborative Divorce *Scott D. Clarke, CDFA, Linda Solomon, LPC, LMFT, LCDC, Norma L. Trusch, J.D.*
	Shipbuilding: What's in Your Toolkit? *David P. Grau, Sr., J.D.*
	P4 Program™: Four Steps to Great Employees *Angela S. Herbers*
	Helping Clients Plan for Aging Successfully; What's It All About? *Louise A. Schroeder, CFP®*
	The Last, Largest, Most-Neglected Asset on your Clients' Balance Sheet *Barry D. Flagg, CFP®, CLU, ChFC*
10:30 a.m.	**FPA EXPERIENCE 2012 ADJOURNS**

CURRENT EXHIBITOR LIST (as of July 1, 2012)

361 CAPITAL
ABERDEEN ASSET MANAGEMENT
ADVISOR PARTNERS LLC
ADVISOR SOFTWARE, INC.
AMERICAN FUNDS
AMERIPRISE FINANCIAL SERVICES, INC.
ATBS
AVE MARIA MUTUAL FUNDS
BOK FINANCIAL ADVISOR TRUST SERVICES
CHARLES SCHWAB ADVISOR SERVICES
COLE REAL ESTATE INVESTMENTS
COLLEGE FOR FINANCIAL PLANNING
COVENTRY
DUNDEEWEALTH US, LP
E.I.I. REALTY SECURITIES
EQUITY TRUST COMPANY
EVERBANK
FIDUCIARY 360
FINANCIAL ADVISOR MAGAZINE
FIPATH, INC.
FIRST COMMAND FINANCIAL SERVICES
FISERV
FPA FUNDS
FROST INVESTMENT ADVISORS, LLC
HANCOCK HORIZON FUNDS
INSTITUTE FOR DIVORCE FINANCIAL ANALYSTS
JUNXURE
KEELEY FUNDS, INC.
LASERFICHE
LEUTHOLD FUNDS
MACRORISK ANALYTICS
MARKEL CAMBRIDGE ALLIANCE
MERIDIAN-IQ
MERK FUNDS
METLIFE
MIRAE ASSET GLOBAL INVESTMENTS
MONEY TREE SOFTWARE
MONEYGUIDEPRO
MORNINGSTAR, INC.
NATIONAL ENDOWMENT FOR FINANCIAL EDUCATION
NATIONWIDE FINANCIAL SERVICES INC.
NEW YORK LIFE/MAINSTAY INVESTMENTS
NOBLE ROYALTIES, INC.
THE OPTIONS INDUSTRY COUNCIL
ORION ADVISOR SERVICES, LLC
PERMANENT PORTFOLIO FAMILY OF FUNDS, INC.
PLANPLUS INC.
RAINIER INVESTMENT MANAGEMENT, INC
THE REGUS GROUP
SATURNA CAPITAL
SBAUER FUNDS
SCOTTRADE ADVISOR SERVICES
SCOUT INVESTMENTS
SEI INVESTMENTS
SELECTED FUNDS
SINCERE & CO., LLC
SOURCE MEDIA
THE STATE LIFE INSURANCE COMPANY
SUMMIT BUSINESS MEDIA
SUNGARD
T. ROWE PRICE
TIAA-CREF
TRUST COMPANY OF AMERICA
U.S. GLOBAL INVESTORS, INC.
UNITED STATES COMMODITY FUNDS
UTAH EDUCATIONAL SAVINGS PLAN
WADDELL & REED, INC.
WEALTHCARE CAPITAL MANAGEMENT
WEITZ FUNDS
ZYWAVE, INC. (FORMERLY EISI)

COMPANION AND PRE-CONFERENCE EVENT PROGRAMS

San Antonio offers a blend of charm, vibrancy and color

FPA Experience 2012 will be held at the Henry B. Gonzalez Convention Center which is located downtown on the city's charming River Walk, just steps away from 300 restaurants, and the city's best known historic sites, such as the Alamo, La Villita, and HemisFair Park.

A group of tours and pre-conference events have been organized for guests and those arriving early to the city. Registration for each program is available with full conference registration; detailed program information is available online.

▾ PRE-CONFERENCE EVENT PROGRAMS

FRIDAY, SEPTEMBER 28

8:00 a.m. – 5:30 p.m. **The Seven Stages of Money Maturity® Workshop: A Model for Understanding and Developing Client Relationships**

George D. Kinder, CFP®, RLP®

EARLY BIRD RATES (VALID THROUGH AUGUST 17): FPA MEMBERS: $795; NONMEMBERS: $895 | FULL RATES: FPA MEMBERS: $895; NONMEMBERS: $995

GrowBIG® Workshop: Accelerating and Strengthening Client Acquisition and Retention

Mo Bunnell, Managing Partner of Bunnell Idea Group and Debra Partridge, Certified GrowBIG® Facilitator and Coach

EARLY BIRD RATES (VALID THROUGH AUGUST 17): FPA MEMBERS: $1,950; NONMEMBERS: $2,150 | FULL RATES: FPA MEMBERS: $2,450; NONMEMBERS: $2,650

SATURDAY, SEPTEMBER 29

8:00 a.m. – 12:00 p.m. **The Healthcare Conversations and Family Support Network: Integrating Health, Caregiving, and Special Needs Challenges and Solutions into a Holistic Planning and Implementation Process**

Lewis J. Walker, CFP®, RC® and Maria C. Forbes, Kolbe Certified™, AECS®

EARLY BIRD RATES (VALID THROUGH AUGUST 17): FPA MEMBERS: $149; NONMEMBERS: $179 | FULL RATES: FPA MEMBERS: $179; NONMEMBERS: $209

8:00 a.m. – 12:00 p.m. **Making the Modern Estate Plan Work**

Leslie R. Daff, J.D. and Randy Gardner, CFP®, J.D., LLM, DPA

EARLY BIRD RATES (VALID THROUGH AUGUST 17): FPA MEMBERS: $149; NONMEMBERS: $179 | FULL RATES: FPA MEMBERS: $179; NONMEMBERS: $209

8:00 a.m. – 3:00 p.m. **The Seven Stages of Money Maturity® Workshop: A Model for Understanding and Developing Client Relationships**

George D. Kinder, CFP®, RLP®

EARLY BIRD RATES (VALID THROUGH AUGUST 17): FPA MEMBERS: $795; NONMEMBERS: $895 | FULL RATES: FPA MEMBERS: $895; NONMEMBERS: $995

GrowBIG® Workshop: Accelerating and Strengthening Client Acquisition and Retention

Mo Bunnell, Managing Partner of Bunnell Idea Group and Debra Partridge, Certified GrowBIG® Facilitator and Coach

EARLY BIRD RATES (VALID THROUGH AUGUST 17): FPA MEMBERS: $1,950; NONMEMBERS: $2,150 | FULL RATES: FPA MEMBERS: $2,450; NONMEMBERS: $2,650

8:00 a.m. – 3:00 p.m. **What Color is Your Parachute? For Financial Planners: Designing Your Next Stage of Life**

John E. Nelson

EARLY BIRD RATES (VALID THROUGH AUGUST 17): FPA MEMBERS: $249; NONMEMBERS: $279 | FULL RATES: FPA MEMBERS: $349; NONMEMBERS: $379

▾ COMPANION TOURS

7:00 a.m. – 2:00 p.m. **Golfing at Riverside Golf Course** | COST: $99/PERSON

(8:00 a.m. modified shotgun start)

10:00 a.m. – 3:00 p.m. **Historic San Antonio Tour** | COST: $69/PERSON

SUNDAY, SEPTEMBER 30

9:00 a.m. – 3:00 p.m. **Natural Bridge Caverns and Gruene Tour** | COST: $79/PERSON

MONDAY, OCTOBER 1

8:00 a.m. – 2:30 p.m. **Fredericksburg Wine Tour** | COST: $79/PERSON

FINANCIAL PLANNING ASSOCIATION

TOP 6 REASONS TO ATTEND FPA EXPERIENCE 2012

LEARN

LEARN about the latest tools and technologies

GROW

GROW your practice by increasing your knowledge base

CONNECT

CONNECT with fellow professionals from all over the world

IMAGINE

IMAGINE what you can accomplish in the coming year

LEAD

LEAD the profession with insight into how it is evolving and how you can affect positive change

EXPLORE

EXPLORE how practice management and service solutions are changing

BASIC REGISTRATION FEES

	Early-bird Rate By August 17	Full Rate After August 17
FPA Member	$699	$1,099
Non-member	$999	$1,399
Student	$259	$259

Don't forget to book your hotel room by August 30th to take advantage of FPA's discounted rate!

REGISTER BY AUGUST 17, 2012 AND SAVE $400!

REGISTER TODAY AT FPAAnnualConference.org

Housing Information

The following hotels are offering discounted rates to ***FPA Experience 2012*** *attendees.*

- Hyatt Regency San Antonio
- Grand Hyatt San Antonio*
- San Antonio Marriott Rivercenter
- San Antonio Marriott Riverwalk

**FPA Experience 2012 Headquarter Hotel.*

Deposits

A valid credit card is required to secure reservations.

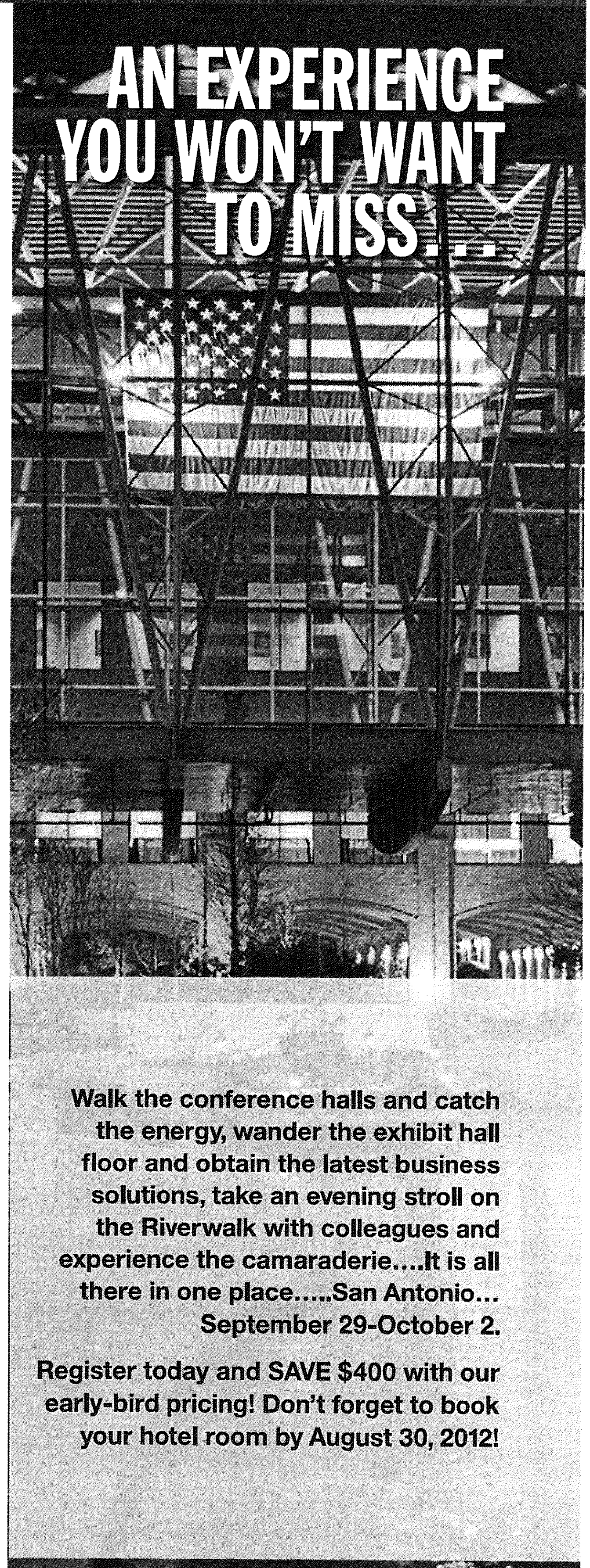
To take advantage of the special FPA Experience 2012 rates, **please book your reservations by August 30, 2012**. After this date the FPA Experience 2012 room blocks will be released and rooms may only be available at higher rates. All rates are per room and are subject to 16.75% tax (subject to change). Special requests cannot be guaranteed; however, hotels will do their best to honor all requests.

IMPORTANT NOTE: FPA has received reports that at least two unofficial housing services, Exhibition Housing Services and National Travel Associates, have been contacting attendees and exhibitors. These firms are making unauthorized contact and are claiming to be partners with FPA to provide housing services. Be aware that FPA has not contracted with these firms and does not endorse, support or warrant their services. The only way to book within the FPA housing block is to book through our Housing Bureau on our Web site. Please be aware of providing credit card information to anyone other than FPA's official housing bureau. If you have any questions about an unauthorized solicitation, or about housing in general, please contact the FPA Experience 2012 Housing Desk by phone at 210.207.6734 (Mon.-Fri. 8:00 a.m.–5:00 p.m. CST excluding holidays).

Changes and Cancellations

Cancellations must be made through the FPA Experience 2012 Housing Desk and must be received by August 30, 2012 at 5 p.m. Any room cancelled after this date and time will incur a $100 cancellation fee. If the reservation is canceled within 72 hours of arrival, or you do not arrive at the hotel on your expected check-in date a one night's room and tax will be charged and your entire reservation will be canceled.

Changes to your existing reservation can be made through September 1, 2012 and must be made with the FPA Experience 2012 Housing Desk. After September 2, 2012 at 5 p.m. EST, changes can be made directly through the hotel. Please do not contact your assigned hotel directly before September 1, 2012.



Financial Planning Association
7535 E Hampden Ave | Suite 600
Denver, CO 80231

PRSRT
FIRST CLASS MAIL
US POSTAGE
PAID
DENVER,CO
PERMIT #3280

Presenting Sponsor

Ameriprise Financial

Associate Sponsors

First Command

Laserfiche

National Sponsor

Ameritrade Institutional

FPA

CONFERENCE SERIES

EXPERIENCE 2012

ONE EVENT

ONE COMMUNITY

THOUSANDS OF EXPERIENCES

JOIN YOUR COLLEAGUES IN SAN ANTONIO
SEPT 29 – OCT 2, 2012
HENRY B. GONZALEZ CONVENTION CENTER

REGISTER TODAY AT
FPAAnnualConference.org