

*Program Schedule to change without notice – All FPA Houston chapter meetings will be held at the Junior League of Houston with the exception of the FPA Houston Financial Planning Symposium which will be held at the Westin Galleria Houston Hotel. Please visit the FPA Houston website for exact locations and details and up to date program information. [www.FPAHouston.org](http://www.FPAHouston.org).*

**Monday, January 5<sup>th</sup>**  
3:00pm – 6:00pm

Afternoon Program  
Junior League Ballroom

“What’s Up on Capitol Hill”

Kathryn Capage  
Invesco AIM

**Monday, February 2<sup>nd</sup>**  
11:00am – 2:00pm

Luncheon Program  
Junior League Ballroom

Risk & Return of the Bond Market  
Carl Kaufman  
Osterweis Capital Management

The Importance of a Flexible &  
Adaptive Investment Approach in  
Volatile Markets  
Ron Albahary  
Schroders

**Monday, March 2<sup>nd</sup>**  
11:00am – 1:00pm

Luncheon Program  
Junior League Ballroom

Using Life Insurance in Uncertain  
Times  
Timothy C. McFarland, JD  
John Hancock Advanced Markets

Event sponsored by



**Monday, May 4<sup>th</sup>**  
3:00pm - 6:00pm

Afternoon Program  
Junior League Ballroom

**This course qualifies for 2 hrs  
CFP Ethics CE**

CFP Ethics Program  
From Prominence to Prison: Why  
Smart People do Dumb Things  
Presented by Patrick Kuhse

**Tuesday, May 19<sup>th</sup>**

FPA Houston Foundation Golf  
Classic

Wildcat Golf Course  
Details online [www.fpahouston.org](http://www.fpahouston.org)

**CASE Studies**  
**7:30- 8:30 am Breakfast Meetings**

Four Oaks Conference Center  
24<sup>th</sup> Floor Chubb Training Center  
1330 Post Oak Blvd.  
Houston TX 77056

2009 Case Study Topics Coming Soon!

March 17

The case for redesigning workflows process  
efficiencies  
Trust Company of America

April 21

Fixed Income 101  
TriStar Financial

May 12

Get a Better Fit for Your Life  
Insurance Needs  
Houston Advantage Insurance Brokerage

June 16

The X&O of Personal Insurance  
HUB International Personal Insurance

August 18

Managing Client Communications  
Charles Schwab

October 20

Canceled

November 17

Convert or Not Convert...  
That is the 2010 Question  
Invesco AIM

**Monday, June 15<sup>th</sup>**  
*(originally June 5th)*

**12:00 - 5:00pm**

Sessions I & III will qualify for  
CFP & CPA Credits!

Luncheon Program  
Junior League Ballroom

**Annual Half-Day Practice  
Management Workshop**

*Featuring a 'Knowledge Café' by  
Marv Tuttle, FPA National CEO and  
Executive Director; Richard Salmen,  
2009 FPA President; and Dr. Tom  
Potts, 2010 FPA National President on  
the focus topic: "What is your greatest  
challenge and how can FPA assist  
you?"*

*Also featuring the following topics:*

- **How to Read Your Client's  
Mind**
- **Focusing your energy during  
this turbulent market – A how  
and were for advisors?**

**Monday, August 3<sup>rd</sup>**  
**11:00am - 2:00pm**

Luncheon Program  
Junior League Ballroom

**Behavioral Finance Knowledge in the  
Design of Future Retirement Plans**

Presented by Patrick Kuhse

**Thursday, October 8<sup>th</sup>**  
**FPA Houston Financial  
Planning Symposium**

**7:30 am – 4:30 pm**

FPA Houston Financial  
Planning Symposium

Westin Galleria Houston

3 Keynote Speakers

9 Breakout Sessions

30 Sponsors/Exhibitors

**Monday, November 2<sup>nd</sup>**  
**11:00am - 1:00pm**

Luncheon Program  
Junior League Ballroom

Restricted Stocks & Trends in  
Equity Compensation

Presented by Bruce Brumberg

**Tuesday, December 1<sup>st</sup>**  
**11:00am - 2:00pm**

Luncheon Program  
Junior League Ballroom

Topic & Speaker TBA

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*The Heart of Financial Planning™*

Total Estimated CE Credits Provided: 26 CFP, 26 CPA, 5 Insurance, including 2 Hours CFP® Ethics on May 4<sup>th</sup>

No programs are scheduled for July or October.