

FPA Houston

Financial Planning Symposium

Thursday, September 11, 2008



Featured Keynote Sessions

The Changing Face of Retirement

Planning Your Life & Living Your Dreams...At Any Age You Want

The Best of Times For The Best Prepared

Planning From The Inside Out

Also Featuring 9 Breakout Sessions



Mitch Anthony
Advisor Insights, Inc.



Susan Bradley, CFP[®]
Sudden Money Institute



Roy Diliberto,
ChFC, CFP[®]
RTD Financial Advisors

New Location In 2008!

Westin Galleria Houston

5060 W. Alabama - Houston TX 77027



2008 FPA Houston Financial Planning Symposium

Plan to attend the FPA of Houston Financial Planning Symposium on Thursday, September 11th where we will explore all aspects and areas of 'financial planning'. This conference is an exciting opportunity to hear from nationally renowned speakers and enjoy a day of learning, networking and mentoring. In addition to a great agenda and outstanding speakers, this year's event will also feature the return of the exhibitor's area, door prizes and much more.

At this conference planners and advisors will receive the practical guidance you need to develop the most effective planning strategies for your clients. Explore the latest planning tools, their uses and their nuances. Learn how to help your clients incorporate the right mix of planning vehicles, achieve specific financial objectives and understand the underlying methodology.

Here's What You Can Expect

- *Breakfast, lunch & break refreshments*
- *CE Sessions - Current knowledge across a wide variety of disciplines delivered by world-class speakers*
- *35+ Professional Exhibiting Sponsors - the latest offerings from product and service providers and suppliers*
- *Inspiring and informative guest speakers in four keynote and nine breakout sessions*
- *Door prize drawings*
- *Continuing Education Credits (CFP, CPA and Insurance)*

Event Fee Schedule

FPA Members

Early Bird \$200 / Late Reg. \$225

Guests

Early Bird \$225 / Late Reg. \$250

FPA Houston Season Ticket Holders

\$0 (pre-paid if symposium option was purchased)

Early Bird Rates Apply Through
September 1, 2008.

Late Registration: September 2-10



CE Credits

7 hours CFP & CPA CE

3 hours Insurance CE

(CE credits for entire program
pending acceptance)

Event Sponsors/Exhibit Hall

The Exhibit Hall offers one-on-one, face-to-face interaction with 35+ hand-picked leaders in providing products and services to financial advisors. We invite you to see the evolving technology software programs and services in action and ask your specific questions of the experts who have the answers.



Keynote Session's

Changing the Face of Retirement:

The NEW Retirementality

*Planning Your Life & Living Your Dreams
...at Any Age You Want*

Mitch Anthony will challenge listeners to abandon their traditional thinking about Retirement by dispelling the seven great "retiremyths." In the future, retirement will no longer be viewed as an isolated economic event, but instead will be seen as part of ongoing life planning. The New Retirementality is the ability to achieve the freedom to pursue our own goals, at our own pace, and find a sense of balance in life, regardless of age.

The Best of Times, for the Best Prepared

**Susan Bradley – The national expert on Sudden Money
And the industry's thought-leader on the great wave of
"money in motion"**

This is the best of times to be a financial advisor for two solid reasons: more clients and more money in motion than ever before. The combination of the two factors, the demographics that will dominate your career years and the heightened sense of need for professional financial advice will produce more potential clients than ever before. The long predicted huge wave of money in motion, estimate to exceed \$100 trillion will begin to peak in just five years and will continue to be the single largest market throughout your career years. The money in motion wave comes from the financial side of five major life events: sale of a business, inheritance, retirement, widowhood, and divorce.

The key to building a successful career and being in the class of 'the best prepared' is to be equipped to attract and serve life event clients. Life events are the number one reason advisors are hired, not knowing how to manage the distinct challenges of life transition events is a big reason advisors are fired. This session will cover:

- Special characteristics of life event clients
- Where to find and how to attract them
- Points to cover in the initial meeting
- Communication and listening skills
- Samples of SMI's Financial Transitions Planning protocols

Regardless of tough market conditions and the general uncertainties of the economy, if you are properly prepared to serve life event clients, then you are in a uniquely favorable position to build the business of your dreams.

Planning From The Inside Out

Roy Diliberto will demonstrate with actual client examples how all planning, including areas that many advisors approach from the exterior (estate planning, educational funding, retirement withdrawal rates, lump sum vs. pension, etc.), need to be examined from the interior before technical solutions are offered. Specific client questions and interviewing techniques be presented that often uncover issues that would not otherwise be discovered if approached with traditional exterior questions.

Breakout Session Topics

- *Settlement Planning – Structured Settlements: Malpractice pitfalls when planning for settlement recipients & evaluating structured settlement annuities*
- *An International Equity Discussion*
- *Delivering Quality Financial Advice to the Untapped Market*
- *The 4 Stages of Variable Annuity Income*
- *The Good, The Bad, and the Ugly: Arbitrations and What to Expect*
- *Perceptions of Risk in the Bond Market*
- *The Future of Life Insurance: The FutureSystem™ Life Model – Theory & Application*
- *Navigating the ETF Landscape*
- *Financial Transitions Planning for Money in Motion Clients*

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Marsh
Hodges Capital Management
TIAA-CREF Life Insurance Company
ICON Advisers
The Capital Financial Group/H. Beck
Sterling Trust Company
DRDA, P.C.
Waddell & Reed

Agenda

Thursday, September 11

7:00 am - 5:00 pm

7:00 am – 7:45 am Registration Desk Open
Continental Breakfast in Exhibit Hall
7:00 am – 4:30 pm Exhibit Hall Hours

**8:00 – 9:40 Keynote I:
"The Changing Face of Retirement"**

9:40 – 10:10 Break / Visit Exhibit Hall

10:10 – 11:00 Breakout Session - Track I

11:00 - 11:15 Break / Visit Exhibit Hall

11:15 - 12:05 Breakout Session - Track II

12:05 - 12:15 Break

**12:15 - 1:35 Luncheon With Sponsors &
Keynote II: "The Best Of Times For The Best
Prepared"**

1:35 - 1:50 Break / Visit the Exhibit Hall

1:50 - 2:40 Breakout Session - Track III

2:40 pm - 2:55 Break / Visit Exhibit Hall

**2:55 - 4:30 Door Prize Drawings
Keynote III: "Planning From The Inside Out"**

4:30 Conference Adjourned

Exhibiting Universities

Rice University
St. Thomas University