FPA
FINANCIAL PLANNING ASSOCIATION
The Heart of Financial Planning™
Oregon & SW Washington Chapter

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N E W S   R E L E A S E

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Conference for Financial Professionals Set for February 7-8, 2012

Unique case study format will feature variety of speakers and offer continuing education credit

Portland, OR – The Financial Planning Association of Oregon & SW Washington will hold its annual Mid-Winter Conference February 7-8, 2012 at the Red Lion on the River, 909 N. Hayden Island Drive, Portland, OR.

The 2012 Conference will have financial planners reaching for their metaphorical magnifying glasses, among other creative tools as part of the interactive courses relating to this year's theme, "Making the Case for Financial Planning." The conference is designed for financial planners, financial advisers, brokers, CPAs, estate attorneys and insurance representatives. About 150 people from the Pacific Northwest are expected to attend.

Continuing education hours will be provided for insurance agents licensed in Oregon and Washington and professionals holding the Certified Financial Planner (CFP®) certification. FPA is also in the process of securing Certified Wealth Strategist (CWS) Continuing education hours. The conference will feature a trade show highlighting about two dozen companies that sell financial and insurance products.

The conference committee, chaired by Nicolle Landwehr, CFP® of Nations Financial Group, has been working to organize the annual conference. The two day event will feature big name, nationally recognized speakers in the financial planning community. The Conference will begin appropriately with a Murder Mystery Case Study, presented by Bart Brewer of Ken Zahn Associates, Inc. Brewer uses a "murder mystery" case study to explain business continuation planning, estate planning and insurance planning. Additional courses on Tuesday include "Reading of the Will and Mistakes to Avoid," Eden Rose Brown; "Update on the Northwest Economy," John

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Mitchell, Ph. D; Panel on "Special Needs Benefits in Oregon;" and "CFP and Insurance Ethics," Bruce Miller, CFP®.

Wednesday, February 8 speakers include "Working with Difficult Families: Psychological Strategies to Effectively Manage Multiple Ways in Which Money Affects Relationships," Steve Goldbart and Joan DiFuria, Money, Meaning and Choices Institute; "Community Property," June Wiyrick Flores, Ater Wynn LLP; "Choices of Entities," Jonathan Mishkin; "Retirement Beneficiaries," Sarah Yen; and "Oregon Insurance Law," John Lenz, CFP®, CLU, ChFC, Lenz Financial Group.

For a registration brochure call 503-286-8350 or visit the website at www.fpa-or.org to register, review the agenda, and preview the presentations and speaker's bios.

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The Financial Planning Association® (FPA®) is the leadership and advocacy organization connecting those who provide, support and benefit from professional financial planning. FPA demonstrates and supports a professional commitment to education and a client-centered financial planning process.

Based in Denver, Colo., FPA has over 100 chapters throughout the country representing more than 29,000 members involved in all facets of providing financial planning services. Working in alliance with academic leaders, legislative and regulatory bodies, financial services firms and consumer interest organizations, FPA is the community that fosters the value of financial planning and advances the financial planning profession. For more information about FPA, visit www.FPAnet.org or call 800.322.4237.