

"Long Term Strategies in a Short Term World"

Mid-Winter Conference 2009

Tuesday, February 10, 2009

- 7:00 – 8:00 Continental Breakfast/Registration & Sign-in/Exhibits
8:00 – 8:10 Welcome
8:10 – 10:00 **George Kinder –**
"Lighting the Torch: Life Planning's Awakening"
10:00 – 10:30 Coffee Break/Open Exhibit Time
10:30 – 11:30 **Dean Mioli – "Tax Management Strategies in the Current Economic Marketplace"** sponsor - **SEI**
11:30 – 11:45 Open Exhibit Time
11:45 – 12:45 Lunch/ "Security Industries Regulation Panel"
12:45 – 1:00 Open Exhibit Time
1:00 – 2:00 **J.D. Roth – "Are Financial Planning Blogs Here to Stay?"**
2:00 – 3:00 **John Mitchell – "Update on the NW Economy"** sponsor - **Aquila**
3:00 – 3:20 Snack Break/Open Exhibit Time
3:20 – 4:10 **Dave Magdol – Investing in Private Companies** sponsor - **Main Street Capital**
4:10 – 4:30 Sign out/Reception/Open Exhibit Time
4:30 – 6:10 **CFP and Insurance Ethics (Optional)**
6:10 – 7:00 **Insurance Only Ethics (Optional)**

Wednesday, February 11, 2009

- 7:30 – 8:00 Continental Breakfast/Registration & Sign-in/Exhibits
8:00 – 8:00 Welcome
8:10 – 10:10 **Ben Coombs, CFP®, CLU –**
"Getting Older: It Happens Whether We Plan for it Or Not"
10:10 – 10:30 Coffee Break/Exhibit time
10:30 – 11:30 **Roberta Eckert – "Wisdom for Advisors"** sponsor - **Lincoln**
11:30 – 11:45 Open Exhibit Time
11:45 – 12:45 Lunch/Board Recognition, Awards/Exhibit Time
12:45 – 1:00 Open Exhibit Time
1:00 – 2:00 **Stephen Holmes – "What Happened in 2008?"**
2:00 – 2:50 **Indigo Teiwes – "Green / SRI Investing"**
2:50 – 3:00 Snack Break/Sign-out/Exhibit time (conference ends for some)
3:00 – 6:00 **John Lenz – "Oregon Statutes & Administrative Rules"** (Optional)

Registration Form: FPA MWC, Feb. 10-11, 2009

Name _____ Designation(s) _____
Name on Badge _____
Company _____
Address _____
City _____ State _____ Zip _____
Phone _____ Email _____

Registration includes all seminars, materials, exhibits, breaks, receptions and meals. Complete one form per person.

Payment Information

Registration fee: \$ _____
 Optional: CFP®/Insurance Ethics (\$50) \$ _____
 Optional: Oregon State Insurance Law Free
Total Due \$ _____

Check made payable to: FPA Credit card (Visa, MC, Amex)
Card # _____
3 Digit Security # _____
Exp date: _____ Name on card _____
Billing Address _____ Billing Zip _____

Send form and payment to:

FPA of Oregon & SW Washington
PO Box 2126
Salem, OR 97308-2126
Questions?
Phone: 503-286-8350
Fax: 503-585-8547
Email: admin@fpa-or.org

Cancellation Policy

A refund of registration less \$50 will be made if the request is received on or before February 2, 2009. While registration is transferable, no-shows and cancellations after February 2, 2009 will receive no refund.

Registration Fees

"Early Bird" (Jan. 13 deadline)
FPA Member \$270
Non member \$320
Student \$195
Regular Rates (after Jan. 13)
FPA Member \$345
Non member \$395
Student \$195

Ethics (w/full reg) \$50
Ethics Class Only \$75



George Kinder

Nationally recognized as the father of the Life Planning movement, the Harvard-educated Kinder is the founder of the Kinder Institute of Life Planning. He has been a practicing financial planner and tax advisor for over 30 years. In 2006, Kinder won the first-ever "Heart of Financial Planning Distinguished Service Award" from the 30,000-member Financial Planning Association for his work as an 'innovator and influencer' in the profession. In 2003 and again in 2005, *Investment Advisor Magazine* named Mr. Kinder as "one of the 25 most influential people in financial services in America." In January 2005, based on a poll of their readership, *Financial Planning Magazine* named Kinder one of the 6 "most influential" financial planners in America.



Ben Coombs

Colin "Ben" Coombs, CFP®, CLU, has spent over 47 years in the financial services profession with experience in life and health insurance, variable annuities and real estate securities. Ben earned his CFP® certification in 1973 and was one of the first 42 CFPs to receive the marks. He previously earned the CLU designation in 1966. He has been commission-only, fee-and-commission, and a fee-only financial adviser. In his "restylement years," not only has Ben served on the CFP Board, he has been actively involved in the FPA's Residency Program and Bridge the Gap Program. *Financial Planning Magazine*, in 2006, recognized Ben as one of the "movers and shakers" in the financial planning profession.

CE's applied for:

11 CFP®, 6 Insurance;
3 Ethics (CFP®, Insurance); 3 Law (OR)

Lodging Information: Hilton Vancouver, WA

Lodging Information

Contact the Hilton Vancouver, WA at 360-993-4500. Make your reservation and request the FPA special rate of \$122 (plus tax). The Hilton is located at 301 West 6th Street, Vancouver, WA 98660.

Book Your Hotel by January 7th!