

Challenging Assumptions In a Changing World

Mid-Winter Conference 2010

Tuesday, February 9, 2010

- 7:00 – 8:00 Continental Breakfast/Registration & Sign-in/Exhibits
8:00 – 8:10 Welcome
8:10 – 9:50 **Mitch Anthony**, "Practice Strategies Using Financial Life Planning"
9:50 – 10:30 Coffee Break/Open Exhibit Time
10:30 – 11:20 **John Mitchell**, "Update on the Northwest Economy" **Aquila Funds**
11:20 – 11:45 Open Exhibit Time
11:45 – 12:35 **Lunch/ Rob McIver**, "Why Quality Matters" **Jensen Investment Management**
12:35 – 1:00 Open Exhibit Time
1:00 – 1:50 **Jeff Auxier**, "Financial Planners and Advisors are the Client's "Cheif Risk Officers"
Auxier Asset Management
1:50 – 2:40 **Martin Jensen**, "Investing in International Funds - Market Update" **ING**
2:40 – 3:20 Snack Break/Open Exhibit Time
3:20 – 4:10 **Chris Sidoni**, "Reevaluating Your Client's Asset Allocation:
Behavioral and Investment Issues" (Roger) Gibson Capital
4:10 – 4:30 Sign out/Reception/Open Exhibit Time
4:30 – 6:10 **Bruce Miller**, CFP® and Insurance Ethics (2 hours) (Optional)
6:10 – 7:00 **Bruce Miller**, *Insurance Only Ethics* (1 hour) (Optional)



Mitch Anthony

Mitch Anthony is recognized as a leading expert in the field of building client relationships. His relational skills programs are currently being used to train advisors in scores of financial services companies. He is president of Advisor Insights and The Financial Life Planning Institute, which are training companies serving advisors and financial services corporations. Mitch has been named one of the financial service industry's top "Movers & Shakers" by Financial Planning magazine. His work has been featured in ABC Evening News, CNN, Wall Street Journal, Bloomberg, CBS Marketwatch, Kiplingers Magazine. Mitch's radio feature, The Daily Dose, is heard daily on 150 radio stations nationwide.

Wednesday, February 10, 2010

- 7:30 – 8:00 Continental Breakfast/Registration & Sign-in/Exhibits
8:00 – 8:10 Welcome
8:10 – 9:50 **Bill Bachrach**, "The Trusted Advisor - 5 Ways to Grow Your Business,
Establish Trust and Thrive in Any Economy" **Bill Bachrach & Associates**
9:50 – 10:30 Coffee Break/Exhibit time
10:30 – 11:20 **Karen Susac**, **Symetra Financial**
11:20 – 11:45 Open Exhibit Time
11:45 – 12:45 Lunch/Board Recognition, Awards/Exhibit Time
12:45 – 1:00 Open Exhibit Time
1:00 – 1:50 **Dan Barry**, FPA Government Affairs Director, "FPA Gov. Affairs Update"
1:50 – 2:40 **Laura Lutton**, "Beyond Stars: Using Fund Analysis to
Improve the Investor Experience" Morningstar
2:40 – 3:00 Snack Break/Sign-out/Exhibit time (conference ends for some)
3:00 – 5:30 **John Lenz**, "Oregon Statutes & Administrative Rules" (Optional)



Bill Bachrach

Bill Bachrach is one of the most recognized "names" in the Financial Services industry and was named "one of the four most influential people in the Financial Services industry" by Financial Planning Magazine. As the "father" of the Values-Based Financial Planning™ philosophy and the Trusted Advisor concept, Bill's work has had a profound impact on how Financial Professionals conduct business. On a personal note, Bill Bachrach successfully completed the Hawaii Ironman Triathlon in 1998. He uses this and other unique life experiences to captivate the audiences at his speaking engagements.

Registration Form: FPA MWC, Feb. 9-10, 2010

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 1, 2010. While registration is transferable, no-shows and cancellations after February 1, 2010 will receive no refund.

Registration Fees

"Early Bird" (Jan. 15 deadline)	
FPA Member	\$270
Non member	\$320
Student	\$195
Regular Rates (after Jan. 15)	
FPA Member	\$345
Non member	\$395
Student	\$195
Ethics (w/full reg)	\$50
Ethics Class Only	\$75

CE's Approved: 11 WA Ins, 15 OR Ins
Including 3 Oregon Law, 2 CFP Ethics
and 3 Insurance Ethics CE

Pending: 10 CFP, 2 OR/WA Insurance

Lodging Information: Embassy Suites, PDX

Lodging Information

Contact the Embassy Suites Airport at 503-460-3000. Make your reservation and request the FPA special rate of \$116 (plus tax). The hotel is located at 7900 NE 82nd St, Portland, Oregon 97220.

Book Your Hotel by January 15th!