FPA
FINANCIAL PLANNING ASSOCIATION
The Heart of Financial Planning™

Lifelong Learning & Education Programs

GREATER PHOENIX CHAPTER

2008 New, Enhanced Education Series!
Passion, Vision, Connection

How would you like to see more nationally recognized speakers throughout the year? We are excited to announce that starting in 2008, we will be doing just that. Our goal as a board is to offer the best, most innovative, and engaging speakers to you. Quality financial planning starts with quality education.

We can assure you that these new type of gatherings will truly embrace the Heart of Financial Planning™. You will meet new colleagues, make lifelong friends, and share conversations that will challenge and inspire you.

We look forward to seeing you participate in 2008!!

- Your Committee for Lifelong Learning & Education

Bob Veres — January 23, 2008

Bob Veres has been a commentator, author and consultant in the financial services industry for more than twenty years. He has worked as editor of Financial Planning magazine; as a contributing editor to the Journal of Financial Planning; as a columnist and editor-at-large of Dow Jones Investment Advisor magazine; and as editor of Morningstar's advisor website, MorningstarAdvisor.com. He authored **The Cutting Edge in Financial Services** (Bloomberg Press, Jan. 2003), and has presented at many of the financial planning industry's largest professional conferences.

Mr. Veres is editor and publisher of Inside Information, an interactive subscription-based information service for financial planning professionals. Inside Information presents a continuous and comprehensive review of the changes that the financial services profession is going through, what new services are being offered, new trends in managing a practice, shifts in the accepted wisdom about portfolio building, and pieces on how investment professionals can unlock their personal potential in a very demanding and competitive business.

Mr. Veres has been named one of the most influential people in the financial planning profession by Investment Advisor magazine and by Financial Planning magazine, and was granted the lifetime achievement award for service to the profession by the National Association of Personal Financial Advisors, and Heart of Financial Planning Distinguished Service Award from the FPA.

2008 Schedule - through May

January 23
Bob Veres

February 27
Michael Kitces

March 14 - Fri. Mtg.
Andrea White

March 26
Ed Jacobson, Ph.D.

April 23
Eugene Fama, Jr.

May 28 - Symposium
Hugh Massie
Richard Ferri
Bryce James

"Sit down before fact as a little child, be prepared to give up every conceived notion, follow humbly wherever and whatever abysses nature leads, or you will learn nothing."

~Thomas Huxley

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Michael Kitces - February 27, 2008

Michael E. Kitces, MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL, CWPP™ is Director of Financial Planning for Pinnacle Advisory Group, a private wealth management firm located in Columbia, Maryland that oversees approximately $600 million of client assets. He is an active writer and editor and has been featured in publications including *Financial Planning*, the *Journal of Financial Planning*, *Journal of Retirement Planning, Practical Tax Strategies, Leimberg Information Services*, as well as *The Wall Street Journal, BusinessWeek, CNBC PowerLunch, NBC Nightly News,* and more. In addition, Michael is a co-author with John Olsen of "*The Annuity Advisor*", the first balanced and objective book on annuities written for attorneys, accountants, and financial planners, and is also a co-author of *"Tools & Techniques of Retirement Income Planning"* with Steve Leimberg and others.

Michael was recognized as one of only 5 financial planning practitioner "Movers and Shakers" for 2006 by *Financial Planning* **magazine, and was recognized as one of 20 "Rising Stars in Wealth Management" by** *Institutional Investor News* **for 2007.**

Andrea White - March 14, 2008 (Friday Mtg.)

Andrea White is a Master Coach, a Certified Professional Co-Active Coach, and President of Financial Conversations, a Business by Design company. She works with individual and groups of financial advisors as they seek to incorporate coaching/life planning skills and practices into their work.

Andrea has been coaching for 6 years, and has 25 years of experience in sales and marketing. Most recently, she was director of marketing and business development for a large accounting firm. Andrea earned a B.A. in Social Welfare and an MBA, both from Arizona State University. She brings extensive experience in working in the Phoenix area and the financial services industry. Andrea is a member of the Financial Planning Association of Greater Phoenix. She is the project manager on a CFP Board of Examiners project to determine the **"Antecedents of Trust in the Client-Planner Relationship."**

Ed Jacobson - March 26, 2008

Ed Jacobsen, PhD., is a psychologist, coach, consultant and public speaker, and trainer based in Madison, Wisconsin. Ed's work focuses on the use of **"appreciative inquiry"** processes with organizations of all sizes, as well as with individuals. Ed serves the Kinder Institute of Life Planning as a trainer and mentor, and presents Appreciative Financial Planning webinar courses through Money Quotient, Garrett Planning Network and the Sudden Money Institute.

Ed has two books coming to press; *Appreciative Moments: Stories and Practices for Living and Working Appreciatively* and **the** *Handbook of Appreciative Questions for Financial Planners.* Ed received a doctorate in psychology from Indiana University and an M.B.A. from The Wharton School. For the last 25 years he has worked as a consultant and coach, including 11 years with KPMG Peat Marwick. He has worked with organizations of varying size, from Fortune 100 companies to small partnerships.

Eugene Fama - April 23, 2008

Eugene F. Fama Jr. adapts academic research to the real world of investing. His presentations make complex ideas not only understandable, but useful and fun. He works equally with advisors and institutional plans. Gene has spent more than 15 years cultivating, refining, and discussing Dimensional's efficient markets investment philosophy. He has been instrumental in shaping the firm's communications, both in print and on the internet. A key contact for many of Dimensional's large US institutional clients, Gene travels frequently, helping advisors and investment plans implement concepts of multifactor investing. The Fama-Frend Three Factor and Five Factor models have become the most widely used portfolio construction tools in the industry. It is used by firms such as SEI, Smith Barney and Lockwood Financial Group, and provides a useful framework within which we can manage factors in more reliable way than the old methodology of managing asset classes.

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(Eugene Fama - continued from previous page)

Gene writes extensively. From articles published in journals to working papers and the monthly *Factors in Practice* column on Dimensional's password-protected website, his writing helps clarify detailed ideas like asset pricing and diversification, and explains why these principles are so important for investment plans. He holds a B.A. in economics
from the University of Chicago.

Richard Ferri — May 28, 2008

Topic - Asset Allocation: When Practice and Theory Collide. **Richard Ferri is CEO of Portfolio Solutions, LLCan investment management firm** based in Troy, MI. Rick has written four books on asset allocation and low-cost investing and is working on a fifth. Currently available are *Serious Money, Straight Talk about Investing for Retirement, All About Index Funds* [2nd Ed: McGraw-Hill], *Protecting Your Wealth in Good times and Bad* [McGraw-Hill] and *All About Asset Allocation* [McGraw-Hill].

Rick earned a Bachelor of Science degree in Business Administration from the University of Rhode Island and a Master of Science degree in Finance from Walsh College. He also holds the designation of **Chartered Financial Analyst (CFA)**. Prior to joining the investment community in 1988, Rick served as an officer and jet pilot in the U.S. Marine Corps and is now retired from the Marine Corps Reserve.

Hugh Massie - May 28, 2008

Hugh Massie, President & Founder of Financial DNA Resources, will present "Financial DNA – Wealth Mentoring Your Clients."

Hugh Massie, is an international Wealth Mentor and the author of "*Financial DNA® – Discovering Your Unique Financial Personality for a Quality Life*" published by John Wiley & Sons in February 2006. Hugh introduces a very different approach to wealth creation and how you can build a quality life.

Hugh and his team have trained over 3500 advisors worldwide in the **Financial DNA® Discovery Process** to position them as wealth mentors. Financial DNA Resources also conducts a range of comprehensive wealth mentoring programs or investors, families, and business owners to help them with their wealth creation and building a quality life aligned to the core of who they are.

Bryce James - May 28, 2008

Bryce James has over twenty years of hands-on investment experience, most recently a partner and founder of Shield Investment Advisors, a fixed-income fund of hedge funds. He was Senior Vice President with Morgan Stanley from 2001-2002 and a principal and senior officer in several start-up companies in addition to founding Seattle's premier non-profit Investment Forum. From 1983 to 2000, Mr. James compiled a stellar record (top 1% in performance) as a fee based portfolio manager and consulted to corporations, trusts, retirement plans, ESOP's and high net worth individuals. He launched his career in the investment industry creating the Investment-Consulting model for brokerage Drexel Burnham Lambert in 1984.

Mr. James, holds a BS in Accounting, Finance and Marketing from Central Washington University, received a Certified Investment Management Analyst designation in 1992 and holds NASD licenses Series 3, 7, 63, & 65. Bryce James, president of Smart Portfolios LLC, will discuss recent advances, such as **Extreme Value Theory (EVT)**, that can improve firms' ability to measure, track and forecast risk and returns; diversify assets; optimize portfolios; and handle and manage data. Mr. James will also detail **best practices for risk management and asset allocation while dispelling some common Wall Street myths**. Advisors who attend will gain a new appreciation for the importance of asset allocation in delivering superior, risk-adjusted returns.

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You speak and we listen!!!
Also coming in 2008….

- **Arizona Insurance CEs**
- **More practice management topics**
- **Expanding the role of Chapter Lifelong Learning and Education to help you develop and succeed!**
- **Want to help? Call Todd Smith CFP at 602/485-3896**

FPA RESOURCES -

National website -
for membership application, resources, etc.
www.fpanet.org
Phone: 1-800-322-4237
Fax-on-Demand: 1-888-423-7329

FPA of Greater Phoenix website -
to register for mtgs., view newsletters, etc.
www.fpaofphoenix.org
Phone: 480/483-9035
email: info@fpaofphoenix.org

2008 Greater Phoenix Chapter Meetings:

We continue to meet primarily at the Phoenix Country Club at 7th Street & Thomas in Phoenix. However, we do meet occasionally at other facilities so you need to read up!

Balance of year's meetings:
June 13 Friday mtg.
June 25 Regular Mtg. & CFP Ethics
July 23 Regular Mtg.
Sept. 24 Regular Mtg.
Oct. 22 Semi-Annual Symposium
Nov. 12 CFP Ethics session & open house
Dec. 17 Regular Mtg.

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