



ANAHEIM  
2009

October 10-13, 2009  
(Pre-conference sessions October 9-10)  
Anaheim Convention Center  
Anaheim, Calif.

Register Online at [www.FPA AnnualConference.org](http://www.FPA AnnualConference.org)

Early-bird Registration Deadline:  
**August 31, 2009**

The Annual Conference of the Financial Planning Community

**Registration Information**

If mailing form, save time and staple your business card here.  
Please print clearly to minimize badge errors.

Name \_\_\_\_\_ Professional Designations \_\_\_\_\_

Name for Badge \_\_\_\_\_ FPA Member ID \_\_\_\_\_

Company Name \_\_\_\_\_

Address \_\_\_\_\_

Address 2 \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP/Postal Code \_\_\_\_\_ Country \_\_\_\_\_

Phone \_\_\_\_\_ FAX \_\_\_\_\_

E-mail \_\_\_\_\_

**Closing Night Reception**

Companions are welcome to the closing night reception; however, a ticket for each companion must be purchased. Participants must be at least 16 years old.

Event details available online.

FPA Anaheim 2009 Closing Night Reception  Yes! I will attend

**Monday, October 12** Free to conference registrants;  
6:30 p.m. - 8:00 p.m. Ticket required; space limited.  
 **Additional Guests** - \$55 per additional guest x \_\_\_\_\_ # of guests.  
**TOTAL Special Events \$ \_\_\_\_\_**

**Companion Programs**

All activities require a minimum number of participants. Participants must be at least 16 years old. See Web site for program information. Please refer to the cancellation /refund policy on second page of this form.

Companion Badge Name(s) \_\_\_\_\_

**Discover the California Riviera By Land and Sea**  **\$65 x \_\_\_\_\_**  
Saturday, October 10 (# of tickets)  
10:00 a.m. - 3:00 p.m.

**Southern California Wine Tasting**  **\$95 x \_\_\_\_\_**  
Sunday, October 11 (# of tickets)  
9:00 a.m. - 3:00 p.m.

**Hollywood "Walk of Stars" Tour**  **\$65 x \_\_\_\_\_**  
Monday, October 12 (# of tickets)  
11:00 a.m. - 3:00 p.m.

**TOTAL Companion \$ \_\_\_\_\_**

**FPA Anaheim 2009 Multimedia CD-ROM**

Purchase complete conference multimedia CD-ROM that includes the audio and PowerPoint presentations from all recorded educational sessions. Allow 6-8 weeks after FPA Anaheim 2009 for delivery.

Pre-conference Price:  \$395 (FPA Member)  \$495 (Non Member)

**TOTAL Recordings \$ \_\_\_\_\_**

**FPA Anaheim Basic Registration Fees**

DEADLINES:	RATES:		
	Commitment July 1	Early-bird August 31	Full Price October 13
<input type="checkbox"/> FPA Member	<b>\$575</b>	<b>\$675</b>	<b>\$875</b>
<input type="checkbox"/> FPA Student Member	<b>\$300</b>	<b>\$350</b>	<b>\$450</b>
<input type="checkbox"/> Nonmember	<b>\$925</b>	<b>\$925</b>	<b>\$1125</b>

Not a member, but want to register at the member rate? Call 800.322.4237 (303.759.4900) to speak with a member services representative.

**TOTAL Basic Registration Amount: \$ \_\_\_\_\_**

**Optional Programming Registration**

Space is limited; registration is required. Member prices are in **BOLD**  
Friday - Saturday, October 9-10

**Academy of Financial Services (AFS) Annual Meeting**

	Early-bird	Full Price
<input type="checkbox"/> Two-Day Workshop	\$255	\$255

**Friday - Saturday, October 9-10**

**Behavioral Advice: Delivering Superior Portfolio Performance to Clients**

	Early-bird	Full Price
<input type="checkbox"/> Two-Day Workshop	<b>\$625 / \$725</b>	<b>\$695 / \$795</b>

**Saturday, October 10**

	Early-bird	Full Price
<input type="checkbox"/> <b>Lessons in Retirement Income Planning</b>		
<input type="checkbox"/> Half-Day Workshop (morning only)	<b>\$125 / \$150</b>	<b>\$145 / \$185</b>
<input type="checkbox"/> Half-Day Workshop (afternoon only)	<b>\$125 / \$150</b>	<b>\$145 / \$185</b>
<input type="checkbox"/> Full-Day Workshop	<b>\$225 / \$285</b>	<b>\$275 / \$335</b>

**Saturday, October 10**

Powered by Investment Management Consultants Association (IMCA)  
**Institutional Portfolio Construction and Investment Policy – A New Paradigm for Serving the Needs of Endowment and Foundation Clients** (a.m. only)

**Trends in Private Wealth Management—Advanced Preservation and Distribution.** (p.m. only)

	Early-bird	Full Price
<input type="checkbox"/> Half-Day Workshop (a.m. only)	<b>\$125 / \$150</b>	<b>\$145 / \$185</b>
<input type="checkbox"/> Half-Day Workshop (p.m. only)	<b>\$125 / \$150</b>	<b>\$145 / \$185</b>
<input type="checkbox"/> Full-Day Workshop ( 10/10 all day)	<b>\$225 / \$285</b>	<b>\$275 / \$335</b>

**Saturday, October 10**

	Early-bird	Full Price
<input type="checkbox"/> <b>Cross Border Planning</b>	<b>\$125 / 150</b>	<b>\$145 / 185</b>

**Saturday, October 10**

	Early-bird	Full Price
<input type="checkbox"/> <b>Diversity Summit</b> ( 11:30 a.m. - 1:30 p.m. only)	Free	Free

**Saturday, October 10**

	Early-bird	Full Price
<input type="checkbox"/> <b>ETF Managed Solutions Conference</b> Sponsored by iShares		
<input type="checkbox"/> Full-Day Workshop (10/10 all day)	Free	Free

**TOTAL Optional Programming \$ \_\_\_\_\_**

## Registrant Information

Please help us collect accurate attendee demographics by answering the following questions.  
 This information is not required to process your registration.

What aspect of FPA Anaheim 2009 motivated you to register? (Check all that apply)

- Educational Program   
  CE Credits   
  Past Attendee   
  Networking   
  Destination   
  Community  
 Exhibit Hall   
  Chapter   
  Other \_\_\_\_\_

Which of the following products do you recommend for your clients? (Check all that apply)

- Annuities   
  Cable / communications   
  Equipment Leasing   
  Insurance   
  Load Funds   
  No-Load Funds  
 Oil & Gas   
  Real Estate   
  Stocks/Bonds   
  Tangibles   
  Other \_\_\_\_\_

By what type of firm are you employed?

- Independent RIA   
  Independent Broker-Dealer   
  RIA Affiliated Broker-Dealer   
  Regional / Local Brokerage  
 National Wirehouse   
  Academic Institution   
  Insurance Company   
  Bank  
 Law Firm   
  Accounting Firm   
  Consulting   
  Other \_\_\_\_\_

## State Insurance

Will you be applying for state insurance CE credit for applicable sessions? (required for processing)   
 Yes   
 No

State in which you are licensed: \_\_\_\_\_

Note: at this time, FPA can only accommodate reporting for one state per attendee.

The states to which FPA is applying for state CE credit are:

Arizona, California, Colorado, Florida, Georgia, Illinois, Indiana, Iowa, Kansas, Maryland, Massachusetts, Michigan, Minnesota, Missouri, Nevada, New Mexico, North Carolina, Ohio, Oregon, Pennsylvania, Texas, Virginia, Washington, and Wisconsin.

Name as it appears on your insurance license: \_\_\_\_\_

License number as it appears on your license: \_\_\_\_\_

NPN Number (as assigned by NAIC): \_\_\_\_\_

## Conditions and Payment

All fees are in U.S. Dollars

**Basic Registration**    \$ \_\_\_\_\_  
**Optional Programming**    \$ \_\_\_\_\_  
**Multimedia CD-ROM**    \$ \_\_\_\_\_  
**Closing Night Reception**    \$ \_\_\_\_\_  
**Companion Programs**    \$ \_\_\_\_\_  
  
**GRAND TOTAL**    \$ \_\_\_\_\_

- Check enclosed (made payable to FPA) / Check No. \_\_\_\_\_  
 Visa  
 MasterCard  
 Discover  
 American Express

Credit Card # \_\_\_\_\_    Expiration Date \_\_\_\_\_  
 Signature \_\_\_\_\_    Date \_\_\_\_\_

By my signature above, I hereby authorize FPA to debit my credit card for the total amount. I have read and understand the terms and conditions of this registration agreement. Dues, contributions or gifts to FPA are not deductible for federal income tax purposes, but they may be deductible as business expense.

**SPECIAL SERVICES.** Please check here if you have a disability or require special assistance. Attach a written description of your needs.

I do not wish to have my photograph used in FPA promotional materials.   
 I do not wish to have my name listed on the conference attendee roster.

**CANCELLATION / REFUND POLICY:** Cancellations must be made in writing. All refunds are based on U.S. Postmarked date of written request. Cancellations marked on or before September 18, 2009, to receive full refund, less \$100 processing fee; \$25 processing fee applies to companion program and special evening networking events.  
**No refunds will be given after September 18, 2009.**

## Submit Registration

### Online:

Register online at:  
[www.FPAAAnnualConference.org](http://www.FPAAAnnualConference.org)

### Mail:

Financial Planning Association  
 Suite 400, 4100 E. Mississippi Ave.  
 Denver, CO 80246

### Call:

800.322.4237 (U.S. / Canada)  
 303.759.4900 (International)

### Fax:

303.759.0749