

# Community Building at FPA Anaheim 2009

## "Connecting Colleagues One Planner at a Time"

**Location:**

Level Two Meeting Rooms

**Meeting Rooms:**

Meeting Room 1 - #205A

Meeting Room 2 - #205B

Meeting Room 3 - #206A

**Hours:**

Sunday, October 11 (8 a.m. – 7 p.m.)

Monday, October 12 (8a.m. – 7p.m.)

Tuesday, October 13 (8 a.m. – Noon)

*NOTE: ROOMS ARE AVAILABLE FOR 1 HOUR INTERVALS*

**Community Building Schedule for Sunday, October 11:**

8:00 AM - 9:00 AM	Meeting Room #205A (Seating for 70 - Round Tables)	Meeting Room #205B (Seating for 70 - Round Tables)	Meeting Room #206A (Seating for 70 - Round Tables)
<b>8:00 AM-9:00 AM</b>			<b>Thought Leaders Round Table</b> – hosted by Impact Communications, Inc.
<b>9:00 AM - 10:00 AM</b>			
<b>10:00 AM - 11:00 AM</b>			
<b>11:00 AM- 12:00 PM</b>			
<b>12:00 PM - 1:00 PM</b>	<b>Gathering of FPA of Southern California leaders</b> – hosted by Wendy Todd	<b>Find and Attract New Clients Using LinkedIn</b> – hosted by John Comer	
<b>1:00 PM - 2:00 PM</b>	<b>Financial Counseling for Military Service Members</b> – hosted by Roy W. Werthmuller, Jr.	<b>NexGen Town Hall Meeting</b>	<b>Overview of the Beneficiary Directory System</b> – Mark Kaizerman, CPA/PFS, CFP®, ChFC, CLTC
<b>2:00 PM - 3:00 PM</b>		<b>Consumer Strategy Knowledge Café</b> – hosted by Lori Dille and Ryanne Enyeart	<b>Insuring Your Investment Portfolio</b> – hosted by Dr. Somnath Basu
<b>3:00PM - 4:00 PM</b>			<b>AgeBander – The Alternate Retirement Plan</b> – hosted by the Dr. Somnath Basu
<b>4:00 PM - 5:00 PM</b>			
<b>5:00 PM - 6:00 PM</b>			
<b>6:00 PM-7:00 PM</b>			

**Community Building Schedule for Monday, October 12**

	<b>Meeting Room #205A (Seating for 70 - Round Tables)</b>	<b>Meeting Room #205B (Seating for 70 - Round Tables)</b>	<b>Meeting Room #206A (Seating for 70 - Round Tables)</b>
<b>8:00 AM - 9:00 AM</b>	<b>Using Managed Futures Can Save Your Tail!</b> - hosted by <i>Robert Lindner, CCO, CEO</i>	<b>Real Time Planning</b> - hosted by <i>Sheryl Garrett, CFP</i>	<b>Helping Your Clients Tell and Preserve Their Life Stories</b> - hosted by <i>Beth Sanders</i>
<b>9:00 AM - 10:00 AM</b>	<b>Late Stage College Funding Strategies</b> - hosted by <i>Deborah Fox</i>	<b>How Can I Afford Retirement? Non- Commercial Public Event for FPA Chapters</b> - hosted by <i>Don Bandin</i>	<b>Document Management - Smarter, Faster and Fully Integrated Into Your Practice</b> - hosted by <i>Joanne Day</i>
<b>10:00 AM - 11:00 AM</b>	<b>Your Silver Bullet Members Meeting</b> - hosted by <i>Joanne Day</i>		
<b>11:00 AM-12:00 PM</b>	<b>Working with the Middle Market and Union Employees</b> - hosted by <i>Scott Hanson, CFP, CFS, ChFC</i>	<b>The Economics of Client Loyalty</b> - hosted by <i>Julie Littlechild</i>	<b>Becoming a Fiduciary Advisor</b> - hosted by <i>Blaine Aikin, AIFA, CFA, CFP</i>
<b>12:00 PM - 1:00 PM</b>	<b>Social Security Fix - Working Together to Build Consumer Awareness and Encourage Government Action</b> - hosted by <i>Alan Ungar</i>	<b>AgeBander - The Alternate Retirement Plan</b> - hosted by <i>the Dr. Somnath Basu</i>	<b>FinaMetrica Users' Meeting and Best Practices Risk Profiling</b> - hosted by <i>Geoff Davey</i>
<b>1:00 PM - 2:00 PM</b>		<b>Insuring Your Investment Portfolio</b> - hosted by <i>the Dr. Somnath Basu</i>	<b>Junxure User's Group and CRM Best Practices</b> - hosted by <i>Greg Friedman, MS, CFP®</i>
<b>2:00 PM - 3:00 PM</b>			
<b>3:00PM - 4:00 PM</b>		<b>Find and Attract New Clients Using LinkedIn</b> - hosted by <i>John Comer</i>	<b>Planipedia Introduction and Conversation</b> - hosted by <i>Shawn Brayman and Devang Shah</i>
<b>4:00 PM - 5:00 PM</b>			
<b>5:00 PM - 6:00 PM</b>			
<b>6:00 PM- 7:00 PM</b>			

**Community Building Schedule for Tuesday, October 13:**

	<b>Meeting Room #205A (Seating for 70 - Round Tables)</b>	<b>Meeting Room #205B (Seating for 70 - Round Tables)</b>	<b>Meeting Room #206A (Seating for 70 - Round Tables)</b>
<b>8:00 AM - 9:00 AM</b>			
<b>9:00 AM- 10:00 AM</b>			
<b>10:00 AM-11:00 AM</b>	<b>2010 Denver Input – Joette Cross &amp; Jean Cantey</b>	<b>2010 Denver Input – Joette Cross &amp; Jean Cantey</b>	
<b>11:00 AM-12:00 PM</b>			