FPA ANAHEIM 2009
The Annual Conference of the Financial Planning Community

TRACK:	***LEADERSHIP LABORATORY***
SESSION: ***979053***	**PROVIDING SERVICES TO FINANCIAL PLANNERS**
	TUESDAY, OCTOBER 13, 2009
	8:45 AM -10:15 AM
PRESENTER:	Gregory H. Friedman, CFP®, MS
	Salient Friedman/Junxure
	Suite 200
	1744 Novato Boulevard
	Novato, CA 94947

Greg is the founder and President of Friedman & Associates, one of Marin County's leading financial planning and wealth management firms in Novato, California. Greg has regularly been recognized as one of the nation's best financial planners, most recently named to an elite list of financial advisors by Financial Planning Magazine as a 2008 "Mover and Shaker." In addition, Greg and Friedman & Associates have consistently been featured by Wealth Manager Magazine as one of the top wealth management firms in the country for the last 6 years.

Known for its exceptional prowess for innovatively leveraging technology, Friedman & Associates was recognized by Charles Schwab Institutional with its prestigious IMPACT Award® in 2008 for "Best in Tech" and also consistently recognized by Schwab for the last xx years for excellence in business and practice management as one of their "Best Managed Firms" since the inception of the program.

In addition to leading Friedman & Associates, Greg is also the President and founder of CRM Software, the developer of Junxure, a client and office management system for independent financial professionals, and ClientView, a tool to create Client Private Web Pages. With over 6,000 users, Junxure has become the industry standard CRM and office workflow technology for professional investment advisors.

Recognizing the need for better technology integration in the financial planning industry, Greg has taken a leadership role in co-founding Your Silver Bullet, LLC, a community of over 5 number of independent software providers whose mission is to accelerate development of integrations among common CRM, financial planning and portfolio and investment management applications.

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PRESENTER:	Angela Herbers
	Financial Advisor Resource, Inc.
	1228 Westloop Pl
	pmb 327
	Manhattan, KS 66502-2840

Throughout her career, Angie has helped over 300 financial professionals recruit, manage and retain professional next generation staff, develop organizational structures, grow revenues and develop productive operational processes and procedures. Prior to forming her own consulting companies, Angie spent her career holding positions at three prominent financial planning firms including The [Sheryl] Garrett Planning Network in Overland Park, KS, Kansas Farm Bureau Insurance in Manhattan, KS and Covenant Financial Wealth Management in Charleston, SC. Angie is a monthly columnist for Investment Advisor magazine where she shares her research and consulting work with other planners who can benefit. She is a frequent speaker at advisor industry conferences on topics including growth management, hiring, retaining and training staff, building partnership and career tracks, and how to manage professional employees. She was named as Investment Advisor magazine's 25 Most Influential People in the Advisory Community in 2007.

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PRESENTER:	Michael E. Kitces, MSFS, CFP®, CLU,ChFC
	Pinnacle Advisory Group, Inc.
	Suite 100
	6345 Woodside Court
	Columbia, MD 21046-1071

Michael E. Kitces, MSFS, MTAX, CFP®, CLU, CHFC, RHU, REBC, CASL, CWPP™, is the 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. In addition, he is the publisher of the e-newsletter The Kitces Report and the blog Nerd's Eye View through his website kitces.com, dedicated to advancing knowledge in financial planning. Beyond his website, Michael is an active writer and editor across the industry and has been featured in publications including Financial Planning, the Journal of Financial Planning, Journal of Retirement Planning, Practical Tax Strategies, and 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. These awards were presented to honor Michael's active work in the financial planning community, serving as a member of the Editorial Review Board for the Journal of Financial Planning, a Moderator for the discussion boards on Financial-Planning.com, a commentator on annuity, retirement distribution, and retirement planning issues for Leimberg Information Services, Inc., and for his work as an active member of the Financial Planning Association at the local and National level. Michael is also a co-founder of NexGen, a community of the next generation of financial planners that aims to ensure the transference of wisdom, tradition, and integrity, from the pioneers of financial planning to the next generation of the profession.

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