FPA
FINANCIAL PLANNING ASSOCIATION
OF SPOKANE, WASHINGTON
The Heart of Financial Planning™
1212 N WASHINGTON ST, SUITE 220
SPOKANE, WA 99201-2400

Register Now!

3rd Annual Workshop & Dinner Meeting
Wednesday, November 14, 2012

The Davenport Hotel, Early Bird Room

09:30 AM **Registration Desk / FPA Membership / Sponsor Exhibits**

10:00 AM **CFP® Ethics Workshop**

All CFP® professionals must obtain 2 hours of ethics credit bi-annually. This program is designed to fulfill that requirement.

CE Credits: CFP® Approved/2 hours (Ethics)

12:00 Noon **Registration Desk / FPA Membership / Sponsor Exhibits**

Lunch on your own.

01:00 PM **The ClientDriven Practice: Stop Asking For Referrals**

Stephen Wershing, CFP® wants you to know your clients want to do more for you if you will take their advice. Wershing coaches financial advisors to engage their best clients in driving the strategic plan of their practices. His firm, The Client Driven Practice, teaches advisors how to focus their business on what clients' value most, resulting in elevated productivity, higher profitability, and dramatically increased referrals.

CE Credits: *CFP®* No credit (Practice Management)

02:40 PM **Registration Desk / FPA Membership / Sponsor Exhibits**

Break w/light refreshments.

03:00 PM **"Insuring High Income Professionals and Business Owners"**

Lynn Christofferson, a Disability Income Specialist for Pacific Advisors. She will be Re-viewing the new higher issue & participation limits, How to combine multiple companies to get to those limits, Utilizing a retirement disability policy to achieve specific planning goals, Understanding group disability plans, What makes benefits taxable versus tax free, What business disability products can you use to compliment individual policies, How does a buy-sell disability policy work, and Why should a business owner adopt a Qualified Sick Pay Plan.

CE Credits: CFP® 2 hours CE for WA and ID
CPA Recommended/2 hours CPE

The Davenport Hotel, Flowerfield Room

05:00 Social Hour

06:00 Annual Dinner & Chapter Meeting

08:00 Adjourn

Speaker Biographies

Stephen Weshing, CFP ® is the author of the forthcoming McGraw Hill book Stop Asking for Referrals, A Revolutionary New Strategy for Building a Financial Services Business That Sells Itself. Steve entered the investment and financial planning industry in 1987. He has been COO of a national broker/dealer and President of a regional BD. Steve has authored articles for the Journal of Financial Planning on referrals and client advisory boards, and been quoted in many trade and popular publications, including Financial Planning, Investment Advisor, Financial Advisor, Investment News and USA Today. In addition to his own blog, he is a blogger for Advisors4Advisors.com and financial-planning.com.

www.theclientdrivenpractice.com

Lynn Christofferson is a Disability Income Specialist for Pacific Advisors. Lynn graduated from the University of Maryland with a degree in Psychology. She joined the insurance industry in 1987 with New England Life, now known as MetLife, to work as a personal producer, and in 1991 moved to Guardian to become a Disability Income Supervisor. In January, 2008, she joined Pacific Advisors and took on a role of Disability Income Specialist, working primarily from the Greater Spokane Area. Lynn has taught Continuing Education classes for over 15 years and is certified to teach in Wash-Washington, Idaho, Oregon, Montana and Alaska. She has spent time volunteering for Displaced Homemakers, which assists recently divorced women prepare for and obtain jobs.

http://www.pacificadvisors.net/about-us/lynn-christofferson/

Overnight Accommodations

As a special enticement for our out-of-town members and friends, The Davenport Hotel is offering special rates for this event! Deluxe rooms at The Davenport, Hotel Lusso, or Davenport Tower begin at $139/night for double occupancy. This offer is subject to availability so *reserve early and don't forget to mention the Financial Planning Association!*

Registration Form

Financial Planning Association of Spokane, Washington
3rd Annual Workshop & Dinner Meeting
Wednesday, November 14, 2012

Name: _____

Company: _____

Address: _____

_____

Telephone: _____ **Email:** _____

FPA Members Only: FPA Members attend any or all events free of charge, *except* for the annual meeting and dinner event ($50.00 fee).

Event	Do you plan to attend?
CFP® Ethics Workshop	☐ Yes ☐ No
The Client Driven Practice- "Stop asking for Referrals"	☐ Yes ☐ No
"Insuring High Income Professionals and Business Owners"	☐ Yes ☐ No
Annual Dinner & Meeting	☐ Yes (please enclose $50.00 fee) ☐ No

Non-Members Only: Non-members are welcome to attend any or all events for a fee of $50.00 per event.

Event	Do you plan to attend?	If "yes", enter fee.
CFP® Ethics Workshop	☐ Yes ☐ No	
The Client Driven Practice- "Stop asking for Referrals"	☐ Yes ☐ No	
"Insuring High Income Professionals and Business Owners"	☐ Yes ☐ No	
Annual Dinner & Meeting	☐ Yes ☐ No	
Total Fee (please enclose)		

Please send your registration form and check to:

Financial Planning Association – Spokane Chapter
c/o Quantum Financial Planning Services
1212 N. Washington Street, Suite 220
Spokane, WA 99201-2400

If you have questions, please email Craig Whitbeck, CFP® at craig@clearfuturefinancial.com or Tiffany Tucker at SpokaneFPA@yahoo.com. Or, call (509) 892-9368 or (509) 328-6653.