



Overview

FPA Business Solutions is the advanced practice management and technology conference for advisers at every stage of their career. The program is filled with practice management and technology sessions covering all practice disciplines including:

- Technology
- Marketing and Distribution
- Practice Optimization
- Portfolio and Asset Management

The program is designed to engage attendees and provide them with practical tools to bring the ideas home and immediately implement them in their own practice.

The FPA Business Solutions Conference attracts a more diverse attendee than other events. While many principals and partners of financial planning firms are in attendance, it also attracts back office staff including paraplanners, assistants, technology professionals, human resource managers and support positions.

Technology vendors are also in attendance and add to the quality of the experience through their product knowledge and interaction with the main program.

Attendee experience levels range from new to the profession, mid-career including creating, merging or enhancing a firm to transitioning out of the profession. Attendees come year after year to stay on the cutting edge of practice management trends and technology.

Event Details

- March 4-6, 2012
- Hyatt Regency, Burlingame, California (SFO Airport)
- Approximately 300 attendees total (50-100 per breakout session)
- Attendees: financial planners, wealth managers, technology professionals, paraplanners
- Average AUM is \$69MM per firm
- Average years in the financial planning industry: 17.67
- Historically top five areas of specialty for the attendees are:
 - Comprehensive Financial Planning
 - Retirement Planning
 - Investment Asset Management
 - Insurance
 - Funding Education
- 25% of attendees are returning from the previous year
- Attendance continues to increase, we were up 15% in 2010 and 30% in 2011
- **Pricing:**
 - **Super Early-Bird** available until December 9, 2011:
 - \$299 for FPA Members
 - \$399 for Nonmembers
 - **Early-Bird** available until January 20, 2012:
 - \$399 for FPA Members
 - \$499 for Nonmembers
 - \$599 to Join & Go (one year of FPA membership included)
 - **Regular** beginning January 21, 2012:
 - \$499 for FPA members
 - \$599 for Nonmembers
 - \$699 to Join & Go (one year of FPA membership included)