FPA FINANCIAL PLANNING ASSOCIATION OF SOUTH CAROLINA

2012 FPA-SC Symposium

Friday, October 26 at the Columbia Metropolitan Convention Center, 1100 Lincoln Street, Columbia, SC 29201 *❄Sign-Up Online Today❄*

Schedule:
(Up to 11 CFP Hours, up to 5 CPE Hours for SC Licensed Accountants, and up to 18 SC Insurance Hours (LAH)

Thursday, October 25th

6:00 pm **Member Reception in the Vista (LongHorn Steak House, 902-A Gervais St.)**

Friday, October 26th

7:30-8:30 am **Registration, Exhibitor Set-up, Coffee**

8:30-8:45 am **Welcome Remarks—Scott Spann, CFP®, EA, FPA SC President**

8:45-9:45 am **Red Zone Retirement Issues – Neil Brown, CPA, CFP®** (1 CFP Hour)
This presentation will provide planners with the tools and knowledge to help them understand reasonable withdrawal rates from a portfolio and distribution/beneficiary planning with IRAs and retirement accounts.

9:45-10:00 am **Visit Exhibitors**

10:00-11:00 am **Estate Planning—David Sojourner, Esq.,** Certified Taxation Specialist and a Certified Estate Planning and Probate Specialist (1 CFP Hour)
Learn how to utilize appropriate tax strategies to minimize estate, gift and income taxes; develop the proper structure for the management and transfer of family businesses, real estate and investment assets.

11:00-12:00 Noon **Irrational Fears: Understanding the Threat to Your Clients – Mark DiGiovanni, MBA, ChFC, CFP®** (1 CFP Hour)
Financial planners see first-hand how fear causes clients to act in ways detrimental to their interests. The presentation reviews how the brain reacts to and creates fears, looks at a dozen of our most irrational fears, and proposes methods to reduce those fears.

12:00 – 1:00 pm **Annual Membership Meeting; State of the Association; Election of Board Members/Lunch and Introduction of Exhibitors & Sponsors**

1:00-2:00 pm **Panel Discussion: Retirement Preparedness in Uncertain Environment** (1 CFP)

2:00-3:00 pm **New Tax Laws & 3.8% Medicare Surtax on Investment Income –John Goldsbury, JD and James W. Jones, CFP® (**1 CFP Hour)
This new tax becomes effective in 2013 and financial planners will need to know how to advise their clients who will be affected. Learn how this tax is calculated and planning issues and opportunities.

3:00-5:00 pm **Columbia Management Presents Social Security & Medicare** (18 SC Insurance Hours and 6 hours CFP credit) ***Pre-Registration MUST be made ONLINE by OCTOBER 11th at 3:00 pm EST by the registrant directly.*** Self-Study materials must be mailed to each registrant by BrokerEd.Net at least 10 days prior to Symposium. ***Broker Registration Online at https://www.brokered.net/columbia/ in addition to FPA's Registration Form.*** (Read Additional Session Information...)
Or
Ethics for the Financial Planner (Webinar)—Herb Daroff, CFP, JD, and Dennis Patrick, CFP, CTFA (2-Hour CFP Required Ethics Course. Format for this session is a webinar with live discussion led by an in-person instructor. Application is being made for SC Insurance Hours; approval information to be posted online at www.fpasouthcarolina.org when available.)

Accommodations: *The Hilton Columbia Center is offering FPA Symposium attendees a courtesy rate of $142.00 single or double occupancy in our King or Double Queen standard rooms and a rate of $192.00 single or double occupancy in our upgraded King Junior Suite for the dates of October 25-26, 2012. Call (803) 744-7800, (803) 476-1303, or 1-800-HILTONS and reference code: L-FPA or Financial Planning Association to receive the discounted rates.*

2012 Symposium Registration

Regular Registration is $125 for FPA members and $175 for nonmembers. Register by October 12 for $25 discount. Fee includes symposium materials, lunch, refreshment breaks. FPA's EIN is 56-2190397.

Not a member of FPA? Visit www.fpanet.org for details.

FPA Discount Registration

- ○ $125(FPA member) / $175 *after Oct. 12*
- ○ $175 (nonmember) / $225 *after Oct. 12*
- ○ $50 (CFP® student) / $65 *after Oct. 12*

Optional Afternoon Session Choice:
(Full-Day attendees, please select one)

- ○ Social Security & Medicare
  (Register no later than Oct. 11th at 3 pm; additional separate online registration required at* https://www.brokered.net/columbia/*)
- ○ CFP Ethics-in-a-Box
- ○

○ I Will Attend the Welcome Reception at Longhorn Steakhouse on Thursday.

Special Thanks to our Conference Sponsor:

ColumbiaManagement

Ethics Session Only

- ○ $50 (FPA member) / $65 *after Oct. 12*
- ○ $65 (nonmember) / $75 *after Oct. 12*
- ○ $25 (CFP® student) / $50 *after Oct. 12*

First Name: _____

Middle Name: _____

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MAIL check along with this form to
FPA-SC Chapter, 1215 Anthony Avenue
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FAX Credit Card Payment Registrations to 803-254-3773