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Meeting Announcement of

THE FEE ADVISOR GROUP OF THE FPA OF LONG ISLAND

The Landscape for Independent Advisor Technology

Wednesday, September 25, 2013 -- 5:30 p.m. – 8:30 p.m.
at
The Milleridge Inn – The Robert Williams Room
585 North Broadway, Jericho, NY 11753; 516-931-2201

Technology is of great concern to any advisor practice to grow, compete and succeed. Sheila Ryan, Senior Team Manager for Schwab Technology Consulting will discuss the roles played by custodial platforms, CRM (Client Relationship Management) systems, Portfolio Accounting/Performance engines, Financial Planning Tools, Trading and Rebalancing Tools, and Document Management Systems. Sheila will also reference case studies of actual RIA's who have built their own technology framework and share their best practices with you.

In the past, many planners in the group have requested a practice management topic. This meeting is a direct response to those requests. We hope to see you at the meeting.

Dinner choices include Chateau Briand, Salmon with Mustard Sauce, Chicken Francaise, Pot Roast or Leg of Lamb.

To register for this meeting, go to www.fpali.org to register online or complete the coupon below and mail it in to the chapter office with your check. For information about the content of the program or the Fee Advisor Group contact Andrew Rich, CFP®, RTRP at richadv@optonline.net or call (516) 433-0828.

September 25, 2013: FEE ADVISOR GROUP MEETING REGISTRATION FORM

FPA OF LI – FEE ADVISOR GROUP MEMBERS: $25.00

Registration includes complete dinner

NAME: _____ FPA Member # _____

E-MAIL: _____
(to confirm your registration)

TO REGISTER, PLEASE MAIL THIS FORM AND YOUR CHECK PAYABLE TO "The Financial Planning Association of LI" TO:
The FPA of LONG ISLAND, 1895 LINCOLN AVE, EAST MEADOW, NY 11554-2522
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