FPA NexGen08

A Communities of Interest Conference

July 25-27
Saint John's Univesity
St. Cloud, Minnesota

Early-bird registration deadline: June 6

www.FPANexGen.org

The next generation of financial planning.

FPA NexGen 08
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FPA NexGen 2008
Schedule at a Glance

Friday, July 25

11:00 a.m. - 6:00 p.m.	Registration and FPA Products Store Open
2:00 p.m. - 3:00 p.m.	Circle Gathering
3:00 p.m. - 3:15 p.m.	Break
3:15 p.m. - 5:00 p.m.	Keynote Session
5:00 p.m. - 5:15 p.m.	Session Break
5:15 p.m. - 6:30 p.m.	Educational Sessions
7:00 p.m. - 8:30 p.m.	Evening Social event
8:30 p.m. - 11:30 p.m.	Karaoke at Willie's Pub

Saturday, July 26

7:00 a.m. - 6:30 p.m.	Registration and FPA Products Store Open
7:15 a.m. - 8:45 a.m.	Sponsored Breakfast
7:30 a.m. - 8:30 a.m.	Sponsored Educational Session
8:45 a.m. - 10:00 a.m.	Educational Sessions
10:00 a.m. - 10:30 a.m.	Refreshment Break
10:30 a.m. - Noon	General Session
Noon - 1:45 p.m.	Lunch/Under the Trees
1:45 p.m. - 3:00 p.m.	Educational Sessions
3:00 p.m. - 3:30 p.m.	Refreshment Break
3:30 p.m. - 5:00 p.m.	Super Session
5:00 p.m. - 7:00 p.m.	Dinner Gathering
7:00 p.m. - 8:30 p.m.	Evening Social event
8:30 p.m. - 11:30 p.m.	Dance Party at Willie's Pub

Sunday, July 27

7:00 a.m. - 8:30 a.m.	Breakfast On Your Own
7:30 a.m. - Noon	Registration and FPA Products Store Open
8:45 a.m. - 10:00 a.m.	Educational Sessions
10:00 a.m. -10:30 a.m.	Refreshment Break
10:30 a.m. - Noon	Closing General Session
Noon	FPA NexGen 2008 Ends

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FPA NexGen 2008
Lifelong Learning Competency Model

FPA's knowledge and learning experiences are designed to meet the needs of all career stages within the financial planning profession. As you grow in experience and expertise you need knowledge, talents, skills and strengths to gain success.

To help you identify the best learning opportunity for you, we have created the FPA Lifelong Learning Competency Model. The Model serves as a resource to help you identify the intended scope and learning level of a particular educational program. Each session is flagged with the career stage and competency with which the session most closely aligns from an educational perspective.

The Model

First, identify the Career Stage based on your experience and expertise.

I - Early (1-5 years)
II - Mid (6-14 years)
III - Late (15+ years)

Next, select the Competency in which you would like to gain knowledge and skill.

1. Business and Practice Management
2. Technical Knowledge
3. Relationship Skills
4. Sales and Marketing
5. Communication Skills
6. Critical Thinking
7. Organizational Skills
8. Human Resources Management
9. Leadership Skills

When applicable, FPA will reference Certified Financial Planner Board of Standards, Inc. topic list for the CFP® Certification Examination by denoting the topic that most closely aligns to the learning event. These include:

1. General Principles of Financial Planning
2. Insurance Planning & Risk Management
3. Employee Benefits Planning
4. Investment Planning
5. Income Tax Planning
6. Retirement Planning
7. Estate Planning
8. Client Trust & Communication

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FPA NexGen 2008 Program

Friday, July 25

11:00 a.m. - 6:00 p.m. Registration and FPA Products Store Open

2:00 p.m. - 3:00 p.m. Circle Gathering
Join NexGen President, Michael Branham, CFP®, and President-elect, Jude Boudreaux, CFP®, to learn how the Circle Process works and participate in a conversation about what NexGen means and your expectations for the conference. Using the Circle Process, you will create community and connections with your colleagues. Discover how you might use the Circle Process with your own groups and participate in one that is meaningful to your NexGen experience by joining in the Circle Gathering.

3:00 p.m. - 3:15 p.m. Session Break

3:15 p.m. - 5:00 p.m. Keynote Session
Mark Tibergien
Sponsored by Pershing Advisor Solutions™
AN AFFILIATE OF THE BANK OF NEW YORK MELLON

Session and speaker information will be available soon; check www.FPANexGen.org for up-to-date information.

5:00 p.m. - 5:15 p.m. Refreshment Break

5:15 p.m. - 6:30 p.m. Educational Sessions *(choose one of two)*

Straight Talk on Ownership
Moderator: Mark Tibergien
Panelists: Sarah K. Bailey, CFP®, and Jason L. McGarraugh, CFP®
Both panelists have become owners of their respective firms recently. After providing a brief description of their professional background, they will answer the questions most associated with ownership, highlighting the differences of the path to ownership from a small and large firm perspective:

- What qualities made your firm/ business partner offer you the ownership opportunity?
- How is your ownership structured?
- Is there a succession plan in place?
- What worked well in your transaction?
- What did you struggle with?
- Is ownership tied to management in your role?

Track: Career
CFP Board CE Credits: 0
Career Level: All
Competency: Business and Practice Management, Human Resources Management, Leadership Skills
CFP Board Topic List: N/A

Embracing Volatility: Budgeting Systematic Risk Through Insulated Beta
Rudy Aguilera
Advisers often rely on correlations derived from historical data to reduce the volatility of their clients' portfolios. Well, there is an old saying, "The only things that go up in a down market are correlations." Join Rudy Aguilera as he lays the foundation for migrating from relative risk thresholds to absolute risk thresholds in your asset allocation models. Learn how to actively budget systematic risk in equity allocations, how to alleviate longevity risk and how to increase the amount of sustainable withdrawals in retirement. By insulating their clients from significant declines, those compensated under an AUM model will also be insulating their revenue stream. Furthermore, a method of providing equity exposure with capital preservation will allow attendees to capture a greater share of baby boomer's assets.

Track: Technology
CFP Board CE Credits: 1.5 (pending)
Career Level: All
Competency: Technical Knowledge
CFP Board Topic List: Investment Planning, Retirement Planning

7:00 p.m. - 8:30 p.m. Evening Social Event
Seek out your colleagues, make new acquaintances while enjoying a barbeque dinner and a hosted bar, at the conference's opening networking event.

8:30 p.m. - 11:30 p.m. Karaoke at Willie's Pub
Practice those high notes, memorize those favorite songs and plan on having fun at the 2nd annual Karaoke night at Willie's Pub.

FPA NexGen 2008 Program

Saturday, July 26

7:00 a.m. - 6:30 p.m. Registration and FPA Products Store Open

7:15 a.m. - 7:45 a.m. Sponsored Breakfast

7:30 a.m. - 8:30 a.m. Sponsored Educational Session

Sponsored By: First Command Financial Services

Session and speaker information will be available soon; check www.FPANexGen.org for up-to-date information.

8:45 a.m. - 10:00 a.m. Educational Sessions *(choose one of two)*

Life Planning: A Model For Best Practices in Financial Planning
Amy N. Mullen
This presentation will clarify several aspects of Life Planning (LP) including what it is, why it is important and how it is integrated into client meeting processes. Learn how LP aligns with and supports CFP Board *Financial Planning Practice Standards* and attendees will also experience LP tools and conversations for themselves. In addition, this presentation will address frequently asked questions and concerns such as, "what if there is push-back from the client?" and "does this work cross the line into therapy?"

Track: Career
CFP Board CE Credits: 1.5 (pending)
Career Level: All
Competency: Business and Practice Management
CFP Board Topic List: Client Trust and Communication

Advanced Concepts and Issues in Long-term Care Insurance Planning
Michael Kitces, CFP®, CLU, ChFC
Although long-term care (LTC) continues to be widely recommended by financial planners, differences remain in the details of particular policies and the philosophical approaches of how to design policies for individual client needs. We will focus on some of the advanced issues that planners should be aware of when reviewing LTC contracts and will provide guidance on philosophical and structural approaches to determining the right policy design for individual client needs. In addition, the session will also provide strategies for how to model LTC needs for clients.

Track: Technology
CFP Board CE Credits: 1.5 (pending)
Career Level: II, III
Competency: Technical Knowledge, Critical Thinking
CFP Board Topic List: Insurance Planning and Risk Management

10:00 a.m. - 10:30 a.m. Refreshment Break

10:30 a.m. - Noon General Session
To Think…Like a CFP® Professional Circa 2008
Richard B. Wagner, CFP®, J.D.
Grounded in his seminal 1990 *Journal of Financial Planning* article, Wagner addresses the issues and implications of an authentic profession. It focuses upon the personal and social challenges imposed by money and the money forces and the implicit roles of financial planners and the financial planning profession. Wagner suggests that authentic professions serve essential functions for individuals and communities. These require practitioners to have strong mission sense and unique perspectives, educations and world views. Comparing financial planning to such peer professions as law, medicine, theology and architecture, Wagner examines what it means "to think…like a CFP® professional in 2008."

CFP Board CE Credits: 1.0 (pending)
Career Level: All
Competency: Communication Skills, Critical Thinking, Leadership Skills
CFP Board Topic List: General Principles of Financial Planning, Client Trust and Communication

Noon - 1:45 p.m. Lunch *(choose one of two options)*

Lunch/Under the Trees
Attendees grab lunch and join the host of a chosen topic of discussion for a compelling dialogue about meaningful issues.

Lunch/Knowledge Café
Attendees grab lunch and join members of FPA's Executive Committee as they lead an interactive discussion of the issues facing NexGen planners as the profession evolves.

FPA NexGen 2008 Program

Saturday, July 26 *(continued)*

1:45 p.m. - 3:00 p.m. Educational Sessions *(choose one of two)*

Effective Use of Associated Professionals is the Key to Higher Profitability
J. Brent Beene, CFP®
Learn why using associated professionals is extremely beneficial to both the quality of advice provided to clients and the future profitability of your practice. Attendees will learn how best to use these professionals and how to act as a coordinator of all your clients’ adviser relationships in a manner that is effortless for clients.

Track: Career
CFP Board CE Credits: 0
Career Level: All
Competency: Relationship Skills, Sales and Marketing, Leadership Skills
CFP Board Topic List: Client Trust and Communication

All You Ever Wanted to Know about Your Client is in Their Form 1040 (and 709 and 1065 and 1120-S…)
Trudy R. Turner, CFP®, CPA
Death and taxes. One learns from a very young age that these are the two constants that cannot be avoided. Therefore, tax returns are seen as a necessary evil. Turner will show how versatile a tool client tax returns can be for a financial planner. What do your clients’ tax returns reveal about their values? Risk tolerance? Tax return preparer? Occupation? Business ventures? Hobbies? What issues and opportunities can planners spot from the review of client tax returns and turn them into "hero stories"? What types of issues and opportunities are present at different levels of client sophistication and/or different levels of planner expertise? Turner will answer all these questions and more.

Track: Technology
CFP Board CE Credits: 1.5 (pending)
Career Level: All
Competency: Technical Knowledge, Sales and Marketing, Critical Thinking
CFP Board Topic List: Income Tax Planning, Client Trust and Communciation

3:00 p.m. - 3:30 p.m. Refreshment Break

3:30 p.m. - 5:00 p.m. Super Session
To Feel Like a CFP® Professional: An Inside Look at Three Firm Models
Moderator: Mark Tibergien
Panelists: Jamie McCusker, CFP®, EA, and Mark Van Drunen, CFP®
Session information will be available soon; check www.FPANexGen.org for up-to-date information.

5:00 p.m. - 7:00 p.m. Dinner Gathering at St. John's Dining Hall

7:00 p.m. - 8:30 p.m. Evening Social Event
Kick back and relax while enjoying a brew (or soft drink) with friends or find your "competitive edge" and participate in some of the field games the NexGen Ambassadors are organizing.

8:30 p.m. - 11:30 p.m. Dance Party at Willie's Pub
Get ready for a great closing night gathering! Come dressed as your favorite superhero, villain, generation-themed or whatever other character you can think of during this evening of music and dancing at Willie’s.

FPA NexGen 2008 Program

Sunday, July 27

7:30 a.m. - Noon Registration and FPA Products Store Open

7:00 a.m. - 8:30 a.m. Breakfast On Your Own

8:45 a.m. - 10:00 a.m. Educational Sessions *(choose one of two)*

Going Independent – A Process Not an Event!
Timothy J. Maurer, CFP®
Do you need to be independent in order to conduct good business as a professional financial adviser? Does true independence provide the optimal platform for advising to take place? What is independence anyway? For young financial advisers, the options are plentiful when hunting for jobs in the financial services industry. Since it has been institutionally discerned that the ideal mechanism for product distribution is "a trusted adviser," it becomes harder and harder to tell the difference. New and/or young advisers need to view their options for employment within a context that separates the product sales organizations from no less sales driven "independents" and true independence. This may come in the form of a new start-up or a collaboration with an entrepreneurial independent organization. The decisions made by this next generation of planners will help increase their own personal satisfaction in their work and will also define the emergence of a new profession that is seen as truly advisory.

Track: Career
CFP Board CE Credits: 0
Career Level: I, II
Competency: Business and Practice Management, Relationship Skills, Critical Thinking
CFP Board Topic List: Client Trust and Communication

Leverage, Hedge or Veg? Technical and Behavioral Decisions in Dealing With Concentrated Stock Positions
Scott D. Oeth, CFP®, ChFC
Scott Oeth will focus on issues surrounding concentrated stock positions. Many planners deal with clients who have built up substantial single stock positions. How much does a client need to diversify? How can you protect against a price decline or diversify in a tax sensitive manner? How much of a stock could a client "afford" to keep given their current position? We will review several frequently encountered situations, including employee stock options, shares obtained through exercise, stock from inheritance, employer stock held in 401(k) and employee stock purchase plans (ESPPs).

Track: Technology
CFP Board CE Credits: 1.5 (pending)
Career Level: All
Competency: Technical Knowledge, Communication Skills, Critical Thinking
CFP Board Topic List: Employee Benefits Planning, Investment Planning, Income Tax Planning

10:00 a.m. -10:30 a.m. Refreshment Break

10:30 a.m. - Noon Closing General Session

Act Like a CFP® Professional
Kyra H. Morris, CFP®, EA
Session and information will be available soon; check www.FPANexGen.org for up-to-date information.

Noon FPA NexGen 2008 Ends

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FPA NexGen 2008 General Information

Circle Gathering

Join NexGen President, Michael Branham, CFP®, and President-elect, Jude Boudreaux, CFP®, to explore this intimate group gathering that is a popular FPA conference tradition and jumpstart to connections. You will learn how the Circle Process works and participate in a conversation about what NexGen means and your expectations for the conference.

Under the Trees

Under the Trees provides a unique way for attendees to self-organize around topics that are meaningful, relevant and, in some cases, spontaneous. Any attendee can offer to host a discussion by posting the topic of discussion on one of the large poster boards in the registration area. Attendees grab their lunch and join the discussion topic host for a compelling dialogue about any one of a number of meaningful issues.

Social Activities

Focusing on our theme of community between NexGen attendees, events include a karaoke and a dance party at the campus gathering spot, Willie's Pub. Detailed activity information is available online and in onsite materials.

Onsite Resources

FPA products and logo apparel will be available to you at the onsite FPA products store. On display will be the latest in FPA Press titles, educational materials, marketing tools and our newest sportswear and logo apparel. Be sure to shop early for the best selection.

Housing Information

All FPA NexGen 2008 events and housing accommodations will be held on the campus of Saint John's University. Lodging includes meals beginning with the evening meal on the arrival date and ends with lunch on the departure date. Lunch on arrival date is not included. Meal plan required for attendees not staying at Saint John's University.

Rooms are university student housing; amenities include bedding, a small bath towel, desk, bed and closet. Rooms do not include television, alarm clock or radio; please bring personal belongings as needed. Campus facilities and access to internet service is included.

Discount Travel

FPA has selected United Airlines and Andavo Travel as the official air carrier and travel agency for FPA NexGen 2008. Make your reservations through Andavo Travel by calling 866.465.7155 (toll-free), or 303.689.7701 (International), and refer to FPA NexGen 2008. Andavo Travel presently charges a $37 fee (subject to change) for ticketing.

You may also contact United directly by calling 800.521.4041 (reference meeting code FPA2008 and provide the meeting tour code ID# 576RN).

Ground Transportation/Shuttle

Saint John's University is located 70 miles northwest of Minneapolis/St. Paul and 15 miles west of St. Cloud on Interstate 94. Executive Express provides shuttle service from Minneapolis/St. Paul to Saint John's University in St. Cloud. Current one-way fares are $56/person; roundtrip fares are $100/person. All fares are subject to a fuel surcharge. Advance reservations are encouraged. For reservations contact Executive Express at 320.253.2226 (888.522.9899 toll-free). Online reservations can be made at www.executiveexpress.biz. Use promotion code NEXGEN to receive a discount.

Continuing Education

The FPA NexGen 2008 program is designed with the potential of up to seven continuing education (CE) credits!

Please note that CE credits are subject to approval, therefore final total CE is subject to change. Check www.FPANexGen.org and onsite materials for the most recent listing of approvals.

FPA designs its programs to comply with the principles of good practice accepted by most major professions. FPA has applied for acceptance from Certified Financial Planner Board of Standards and has applied for certification to the Society of Financial Service Professionals (SFSP), Professional Achievement in Continuing Education (PACE) and accountancy boards of most states requiring continuing education. Because continuing education requirements vary widely among state and national agencies, it is not possible to obtain pre-acceptance from all groups. Attendees will receive an agency-by-agency listing of accepted courses at FPA NexGen 2008.

NASBA NATIONAL REGISTRY OF CPE SPONSORS

Registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing education of the National Registry of CPE Sponsors, state boards of accountancy have final authority on the acceptance of individual courses. Complaints regarding sponsors may be addressed to NASBA, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Web site www.nasba.org.

- Method of Presentation: Lecture, Panel and Open Discussion
- Level of Learning: Overview
- Advance Preparation: None
- Prerequisite Knowledge/Experience: None, entry-level introduction is provided
- Total Recommended CPE Credits: 7 (pending)

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With more than 3,800 students, Saint John's University (and sister school College of Saint Benedict) is the largest of the nation's top 100 liberal arts colleges (as ranked in *US News & World Report*).

Conference Registration Rates

All fees are in U.S. dollars

Registration fees include all general sessions, educational sessions and social activities. Lodging (including meals) is separate; see reverse for details.

	Early-Bird (Through June 6)	Advanced (June 7-June 20)	Onsite (June 21-July 27)
☐ Member	$250	$300	$375
☐ Nonmember	$320	$370	$465
☐ Join-and-Go	$545	$595	$670

Become a member of FPA and enjoy the member registration rate for FPA NexGen 2008 in addition to the benefits of FPA membership. (Registration rate plus $295 for membership.) Visit www.FPAnet.org/join for additional membership information.

Dormitory lodging is available to FPA NexGen 2008 attendees; lodging fees are not included in registration – see the lodging form (on reverse) for details. The registration and lodging cut-off date is June 20, 2008. Rooms and roommates are available on a first-come, first-served basis and are not guaranteed to be available. Meals are included with lodging fees.

☐ **Special Services.** Please check here if you have a disability requiring special service. Attach a written description of your needs.

☐ **Multimedia CD-ROM.** Member: $99 Nonmember: $149
Bring home the best speakers and latest ideas from FPA NexGen 2008 with the complete conference multimedia CD-ROM, which includes the audio and PowerPoint presentations from all recorded sessions. Indicate your pre-conference discounted purchase below or order online at www.ShopFPA.org.

Cancellation/Refund Policy. Cancellations must be made in writing. All refunds are based on U.S. postmark date of request. Cancellations postmarked on or before June 20, 2008, receive a full refund less $100 processing fee. No refunds will be given after June 20, 2008.

Registrant Information

Name ____________________ Badge Name ____________________

Company Name ____________________ FPA Member Number ____________________

Address ____________________

City __________ State __________ ZIP/Post Code __________ Country __________

Phone __________ Fax __________

E-mail ____________________

Payment Information

Full payment is required with registration and housing reservations.

Registration	$__________
Housing	$__________
Extra room nights	$__________
Meal plan only	$__________
CD-ROM	$__________
TOTAL DUE:	$__________

Send Registration Form and Payment to:

FPA, Suite 400, 4100 E. Mississippi Avenue, Denver, CO 80246
Fax: 303.759.0749
Call: 800.322.4237 / 303.759.4900
Register Online: www.FPANexGen.org

☐ Check enclosed ☐ Charge my credit card *(circle one)*: American Express Discover Mastercard Visa

Card # ____________________ Expiration Date __________

Sign, Date and Enclose Registration Fees. I understand the terms and conditions of this registration agreement. Dues, contributions or gifts to FPA are not deductible for federal purposes, but they may be deductible as business expenses.

Signature ____________________ Date __________

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Changes to Lodging Reservations

All reservation transactions, including changes and cancellations, must be made by contacting:

FPA Member Services
4100 E. Mississippi Avenue, Suite 400
Denver, CO 80216
Phone: 800.322.4237 / 303.759.4900
Fax: 303.759.0749

Lodging at Saint John's University

All FPA NexGen 2008 events and housing accommodations will be held on the campus of Saint John's University, County Road 159, St. Cloud, Minn., located 70 miles northwest of Minneapolis/St. Paul and 15 miles west of St. Cloud on Interstate 94.

In order to ensure availability, you must register and reserve your room by June 20, 2008. Reservations made after June 20, 2008, will be accepted on a space-available basis. FPA NexGen 2008 attendees are encouraged to make reservations early by returning this completed form with your payment via fax or mail. You may also register online at www.FPANexGen.org.

Lodging rates are based on a two-night stay and are per person, based on the number of people in the room. Rates include lodging and meals beginning with the evening meal on the arrival date and end with lunch on the departure date. Lunch on your arrival date is not included. Fees below include taxes.

All rooms are non-smoking. Rooms are university student housing; amenities include bedding, a small bath towel, desk, bed and closet. Rooms do not include television, alarm clock or radio; please bring personal belongings as needed. Campus facilities and access to internet service is included.

Housing check-in is in the lower level of Mary Hall at the east end of the building. Check in time is 3:00 p.m., and check out time is 10:00 a.m.

Saint John's University Dormitory Lodging Information

All fees are in U.S. dollars

Please indicate your lodging preference below; payment information on reverse.

Date of Arrival ______ Date of Departure ______ # of nights______

Room Type	Maximum Occupants	Price for two nights, per night July 25 and July 26 (rates include a required daily meal rate, as applicable)	Extra Night July 24
☐ Single room with private bath (1 person / 1 bed / private bath)	1	$164	$82
☐ Single room with shared bath (1 person / 1 bed / shared bath)	1	$154	$77
☐ Double with shared bath (2 person / 2 bed / shared bath)	2	$138	$69

Note for single room with private bath: *Limited availability – shared room will be assigned if rooms are no longer available in this category.*

Note for single room with shared bath: *Limited availability – shared room will be assigned if rooms are no longer available in this category.*

Double with shared bath:

Option A: I wish to share a room with ________________________________. Please submit registrations at the same time. FPA may not be able to accommodate requested roommates if registrations are not submitted to FPA.

Option B: I wish to share a room. Please assign me to a ☐ male / ☐ female roommate.

☐ No room needed — $60 per-day conference meal package (required if no room reservation)

☐ Handicapped-accessible room needed
Limited availability.

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FPA NexGen 2008 Task Force

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